This PDF is generated from authoritative online content, and is provided for convenience only. This PDF cannot be used for legal purposes. For authoritative understanding of what is and is not supported, always use the online content. To copy code samples, always use the online content.

Genesys Cloud CX Use Cases

6/30/2026

Table of Contents

Explore

- Genesys Cloud CX Use Case Benefits 21
- Interdependencies 28
- Maturity 32

List All

- Genesys Work Automation (BO01) for Genesys Cloud 35
- Genesys Customer Authentication (CE07) for Genesys Cloud 44
- Genesys Voice Payment (CE08) for Genesys Cloud 51
- Genesys Outbound Dialer (CE11) for Genesys Cloud 59
- Genesys SMS & Email Notifications (CE12) for Genesys Cloud 71
- Genesys Email Routing (CE16) for Genesys Cloud 82
- Genesys Chat Routing (CE18) for Genesys Cloud 91
- Genesys Co-browse (CE27) for Genesys Cloud 97
- Genesys SMS Routing (CE29) for Genesys Cloud 104
- Genesys Chatbots (CE31) for Genesys Cloud 111
- Genesys Messaging (CE34) for Genesys Cloud 119
- Genesys Predictive Engagement (CE37) for Genesys Cloud 129
- Genesys Voicebots (CE41) for Genesys Cloud 140
- Genesys Personalized Routing with Callback (CE43) for Genesys Cloud 148
- Genesys Contact Center Optimization (CE45) for Genesys Cloud 162
- Rule-Based Decisions by Genesys (CE46) for Genesys Cloud 170

UseCases/Current/GenesysCloud/CE46

- Genesys Virtual Agent (CE47) for Genesys Cloud 178
- Unified Experience from Genesys and ServiceNow (CE48) for Genesys Cloud 187
- Genesys Social Listening (CE49) for Genesys Cloud 193
- Genesys Agent Assist (EE31) for Genesys Cloud 202
- Genesys Agent Copilot (EE32) for Genesys Cloud 209
- Genesys Business Communications (OP01) for Genesys Cloud 216
- Genesys CRM Collaboration (OP02) for Genesys Cloud 226
- Genesys Voice Services (OP04) for Genesys Cloud 232
- Genesys UCC Third-Party Integration (OP07) for Genesys Cloud 248
- Quality Assurance and Compliance (WE01) for Genesys Cloud 256
- Resource Management (WE02) for Genesys Cloud 273
- Employee Performance (WE03) for Genesys Cloud 287

Explore all Genesys Cloud CX 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

"> BO01 Genesys Work Automation Digital Extend journey orchestration to back-office workflows"> 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"> CE11 Genesys Outbound Dialer Outbound Improve customer communications and increase sales conversion using powerful dialer capabilities"> CE12 Genesys SMS & Email Notifications Outbound Use SMS and email to send personalized, timely and relevant notifications to customers."> 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"> CE27 Genesys Co-browse Digital Extend web messaging, voice or chat interactions with Co-browse"> 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."> CE34 Genesys Messaging Digital Offer a powerful new way for customers to connect with you directly in Messages"> 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."> CE43 Genesys Personalized Routing with Callback Inbound Route voice interactions to the best skilled resource with personalization and callback option"> CE45 Genesys Contact Center Optimization Digital Analyze journeys

holistically or as individual flows to understand journey outcomes such as self-service, deflection, first contact resolution and use new insights to improve efficiency and lower costs"> CE46 Rule-Based Decisions by Genesys Digital Give customers the ability to develop, author, and evaluate business rules to improve classification and routing decisions."> CE46 Rule-Based Decisions by Genesys Digital Give customers the ability to develop, author, and evaluate business rules to improve classification and routing decisions."> CE47 Genesys Virtual Agent Digital "> CE48 Unified Experience from Genesys and ServiceNow Digital Manage real-time communications and process customer data on a single solution with a unified agent workspace"> CE49 Genesys Social Listening Digital Seamlessly integrate social media customer care into the all-in-one Genesys Cloud platform, enabling you to monitor, analyze, and engage with customers across social channels."> EE31 Genesys Agent Assist Workforce Engagement Monitor conversations between the customer and agent to surface contextually relevant knowledge and FAQs."> EE32 Genesys Agent Copilot Self-Service and Automation Automatically surface contextually relevant information from a knowledge base during customer conversations."> OP01 Genesys Business Communications Open Platform Simplify contact center and business communications"> OP02 Genesys CRM Collaboration Open Platform Enhance routing capabilities and drive agent screenpops using Genesys Cloud CX Data Actions"> OP04 Genesys Voice Services Open Platform Telephony Connection Options"> OP07 Genesys UCC Third-Party Integration Open Platform Enable customer choice of unified communication providers and telephony solutions through integrations with popular platforms."> WE01 Quality Assurance and Compliance Workforce Engagement Improve quality of agent handling of interactions by deriving insights from interaction recording along with recorded desktop activity, quality evaluations, speech & text analytics and post-interaction survey."> WE02 Resource Management Workforce Engagement Optimize workforce planning and scheduling across all channels. Automate forecasting, scheduling and improve employee engagement."> WE03 Employee Performance Workforce Engagement Agent Skills development, Performance management and Gamification

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 Automation (BO01) Extend journey orchestration to back-office workflows"> 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 Co-browse (CE27) Extend web messaging, voice or chat interactions with Co-browse"> Genesys SMS Routing (CE29) Route SMS interactions to the best resource"> Genesys Messaging (CE34) Offer a powerful new way for customers to connect with you directly in Messages"> 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."> Genesys Contact Center Optimization (CE45) Analyze journeys holistically or as individual flows to understand journey outcomes such as self-service, deflection, first contact resolution and use new insights to improve efficiency and lower costs"> Rule-Based Decisions by Genesys (CE46) Give customers the ability to develop, author, and evaluate business rules to improve classification and routing decisions."> Rule-Based Decisions by Genesys (CE46) Give customers the ability to develop, author, and evaluate business rules to improve classification and routing decisions."> Genesys Virtual Agent (CE47) "> Unified Experience from Genesys and ServiceNow (CE48) Manage real-time communications and process customer data on a single solution with a unified agent workspace"> Genesys Social Listening (CE49) Seamlessly integrate social media customer care into the all-in-one Genesys Cloud platform, enabling you to monitor, analyze, and engage with customers across social channels.

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 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."> Genesys Agent Copilot (EE32) Automatically surface contextually relevant information from a knowledge base during customer conversations.

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 Personalized Routing with Callback (CE43) Route voice interactions to the best skilled resource with personalization and callback option

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"> Genesys SMS & Email Notifications (CE12) Use SMS and email to send personalized, timely and relevant notifications to customers.

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 Agent Assist (EE31) Monitor conversations between the customer and agent to surface contextually relevant knowledge and FAQs."> Quality Assurance and Compliance (WE01) Improve quality of agent handling of interactions by deriving insights from interaction recording along with recorded desktop activity, quality evaluations, speech & text analytics and post-interaction survey."> Resource Management (WE02) Optimize workforce planning and scheduling across all channels. Automate forecasting, scheduling and improve employee engagement."> Employee Performance (WE03) Agent Skills development, Performance management and Gamification

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"> Genesys CRM Collaboration (OP02) Enhance routing capabilities and drive agent screenpops using Genesys Cloud CX Data Actions"> Genesys Voice Services (OP04) Telephony Connection Options"> Genesys UCC Third-Party Integration (OP07) Enable customer choice of unified communication providers and telephony solutions through integrations with popular platforms.

Genesys Cloud CX Use Case Benefits

This page lists all Genesys Cloud CX 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 Attrition Rate
- Improved Employee Occupancy
- Improved Employee Productivity
- Improved Employee Satisfaction
- Improved Employee Utilization
- Improved First Contact Resolution
- Improved Insights and Visibility
- Increased Contact Rate
- Increased Revenue
- Reduced Administration Costs
- Reduced Customer Churn
- Reduced Deployment Costs
- Reduced Employee Attrition
- Reduced Handle Time
- Reduced Interaction Abandonment
- Reduced IT Operational Costs
- Reduced Overtime Costs
- Reduced Penalties and Fines
- Reduced Transfers
- Reduced Volume of Interactions

Improved Agent Competency

- Genesys Work Automation
- Employee Performance

Improved Containment Rate

- Genesys Customer Authentication
- Genesys Chatbots
- Genesys Voicebots
- Genesys Contact Center Optimization

Improved Conversion Rates

- Genesys Outbound Dialer
- Genesys SMS & Email Notifications
- Genesys Predictive Engagement

Improved Customer Experience

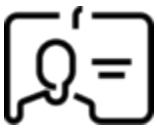
- Genesys Work Automation
- Genesys Customer Authentication
- Genesys Voice Payment
- Genesys SMS & Email Notifications
- Genesys Email Routing
- Genesys Co-browse
- Genesys Chatbots
- Genesys Messaging
- Genesys Predictive Engagement
- Genesys Voicebots
- Genesys Personalized Routing with Callback
- Rule-Based Decisions by Genesys
- Rule-Based Decisions by Genesys
- Genesys Virtual Agent
- Genesys Social Listening
- Genesys CRM Collaboration
- Genesys UCC Third-Party Integration
- Quality Assurance and Compliance
- Resource Management

Improved Employee Attrition Rate

- Genesys Work Automation

Improved Employee Occupancy

- Genesys Work Automation
- Genesys SMS & Email Notifications
- Genesys Social Listening



Improved Employee Productivity

- Genesys Predictive Engagement
- Genesys UCC Third-Party Integration
- Quality Assurance and Compliance

Improved Employee Satisfaction

- Genesys Agent Assist
- Genesys Agent Copilot
- Employee Performance

Improved Employee Utilization

- Genesys Outbound Dialer
- Genesys Email Routing
- Genesys Chat Routing
- Genesys SMS Routing
- Genesys Personalized Routing with Callback
- Rule-Based Decisions by Genesys
- Rule-Based Decisions by Genesys
- Genesys Agent Assist
- Genesys Agent Copilot
- Resource Management

Improved First Contact Resolution

- Genesys Work Automation
- Genesys Voice Payment
- Genesys Email Routing
- Genesys Chat Routing
- Genesys Co-browse
- Genesys Chatbots
- Genesys Messaging
- Genesys Voicebots
- Genesys Contact Center Optimization
- Rule-Based Decisions by Genesys
- Rule-Based Decisions by Genesys
- Genesys Virtual Agent
- Genesys Social Listening
- Genesys Agent Assist

- Genesys Agent Copilot
- Genesys CRM Collaboration
- Genesys UCC Third-Party Integration
- Quality Assurance and Compliance

Improved Insights and Visibility

- Genesys Social Listening
- Quality Assurance and Compliance
- Employee Performance

Increased Contact Rate

- Genesys Outbound Dialer

Increased Revenue

- Genesys Voice Payment
- Genesys Chat Routing
- Genesys Co-browse
- Genesys Predictive Engagement
- Genesys Personalized Routing with Callback
- Genesys Social Listening

Reduced Administration Costs

- Genesys Work Automation
- Genesys Messaging
- Genesys Contact Center Optimization
- Genesys Business Communications
- Genesys Voice Services
- Resource Management
- Employee Performance

Reduced Customer Churn

- Genesys Outbound Dialer
- Genesys Social Listening

Reduced Deployment Costs

- Genesys Business Communications
- Genesys Voice Services

Reduced Employee Attrition

- Employee Performance

Reduced Handle Time

- Genesys Customer Authentication
- Genesys Email Routing
- Genesys Chat Routing
- Genesys Co-browse
- Genesys SMS Routing
- Genesys Predictive Engagement
- Genesys Personalized Routing with Callback
- Genesys Contact Center Optimization
- Rule-Based Decisions by Genesys
- Rule-Based Decisions by Genesys
- Genesys Virtual Agent
- Genesys Agent Assist
- Genesys Agent Copilot
- Genesys CRM Collaboration
- Resource Management

Reduced Interaction Abandonment

- Genesys Customer Authentication
- Genesys Voice Payment
- Genesys Personalized Routing with Callback
- Genesys Contact Center Optimization

Reduced IT Operational Costs

- Genesys Voicebots
- Genesys Business Communications
- Genesys Voice Services
- Quality Assurance and Compliance

Reduced Overtime Costs

- Resource Management

Reduced Penalties and Fines

- Genesys Voice Payment

Reduced Transfers

- Genesys SMS Routing
- Genesys Personalized Routing with Callback
- Rule-Based Decisions by Genesys
- Rule-Based Decisions by Genesys
- Genesys Virtual Agent

Reduced Volume of Interactions

- Genesys Outbound Dialer
- Genesys SMS & Email Notifications
- Genesys Personalized Routing with Callback

Interdependencies

This page lists all Genesys Cloud CX 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:
			• Genesys Email Routing (CE16)	
	• Genesys Personalized Routing with Callback (CE43)			
	• Genesys Call Routing (CE01) • Genesys Customer Authentication (CE07)			
			• Genesys Personalized Routing with Callback (CE43)	
		• Genesys Chat Routing (CE18) • Genesys Messaging		

Use Case	All of the following required:	At least one of the following required:	Optional	Cannot be implemented with the following:
		(CE34) • Genesys Personalized Routing with Callback (CE43)		
		• Genesys Chat Routing (CE18) • Genesys SMS Routing (CE29) • Genesys Messaging (CE34)		
	• Genesys Chat Routing (CE18) • Genesys Chatbots (CE31)			
			• Genesys Personalized Routing with Callback (CE43)	
			• Genesys Customer Authentication (CE07)	
		• Genesys Call Routing (CE01) • Genesys Messaging (CE34)	• Genesys Chatbots (CE31) • Genesys Voicebots	

Use Case	All of the following required:	At least one of the following required:	Optional	Cannot be implemented with the following:
			(CE41) • Genesys Agent Assist (EE31)	
		• Genesys Call Routing (CE01) • Genesys Messaging (CE34)	• Genesys Chatbots (CE31) • Genesys Voicebots (CE41) • Genesys Agent Assist (EE31)	
			• Genesys Voice Services (OP04)	
	• Genesys Voice Services (OP04)			
		• Genesys Email Routing (CE16) • Genesys Chat Routing (CE18) • Genesys SMS Routing (CE29) • Genesys Messaging (CE34) • Genesys Personalized Routing with Callback (CE43)		
		• Genesys Email Routing (CE16)		

Use Case	All of the following required:	At least one of the following required:	Optional	Cannot be implemented with the following:
		• Genesys Chat Routing (CE18) • Genesys Personalized Routing with Callback (CE43)		
			• Quality Assurance and Compliance (WE01) • Resource Management (WE02)	

Maturity

Contents

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

Inbound Use Cases

Level 1	Level 2	Level 3
No use cases with Level 1 maturity for this product category.	• CE43 - Genesys Personalized Routing with Callback	No use cases with Level 3 maturity for this product category.

Digital

Level 1	Level 2	Level 3
• CE16 - Genesys Email Routing • CE18 - Genesys Chat Routing • CE29 - Genesys SMS Routing	• CE27 - Genesys Co-browse	• CE34 - Genesys Messaging • CE37 - Genesys Predictive Engagement

Outbound

Level 1	Level 2	Level 3
• CE12 - Genesys SMS & Email Notifications	No use cases with Level 2 maturity for this product category.	• CE11 - Genesys Outbound Dialer

Open Platform

Level 1	Level 2	Level 3
• OP01 - Genesys Business Communications • OP02 - Genesys CRM Collaboration • OP04 - Genesys Voice Services • OP07 - Genesys UCC Third-Party Integration	No use cases with Level 2 maturity for this product category.	No use cases with Level 3 maturity for this product category.

Self-Service and Automation

Level 1	Level 2	Level 3
• CE07 - Genesys Customer Authentication	• CE08 - Genesys Voice Payment	• CE31 - Genesys Chatbots • CE41 - Genesys Voicebots • EE32 - Genesys Agent Copilot

Workforce Engagement

Level 1	Level 2	Level 3
No use cases with Level 1 maturity for this product category.	No use cases with Level 2 maturity for this product category.	• EE31 - Genesys Agent Assist • WE01 - Quality Assurance and Compliance • WE02 - Resource Management • WE03 - Employee Performance

Genesys Work Automation (BO01) for Genesys Cloud

Extend journey orchestration to back-office workflows

What's the challenge?

In today's digital landscape, delivering seamless customer experiences is crucial for any organization's success. However, crafting a truly delightful experience goes beyond the initial interaction in the contact center. It requires a intentional approach, orchestrating both the customer interactions, originating in the contact center, and the back-office tasks, such as order fulfillment, account updates, and technical support, that ensure a positive outcome. Brands fail to meet these expectations if work falls through the cracks, leading to frustrated customers and inefficiencies within the organization. Employee morale can suffer with mounting workloads, while the business faces issues like low utilization, failed SLAs, high transfer rates, customer churn, lower sales, and poor visibility into overall performance. To address these challenges, organizations need a better way to orchestrate work from the first interaction in the contact center all the way through to resolution.

What's the solution?

Extend end-to-end journey orchestration to the back office. Provide a single pane of glass to agents for handle all work. Provide end-to-end observability and management.

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
- 7 Related Documentation
  - 7.1 Genesys Cloud Routing Methods
  - 7.2 Workflows and business logic
  - 7.3 Document Version

Use Case Overview

Story and Business Context

Routing work effectively into the contact center unlocks a multitude of business benefits that significantly impact customer experience and operational efficiency. It is challenging to balance and distribute high volumes of work items along with interactions, quickly, and in accordance to the underlying customer commitment or SLA. While many have invested in automation, these systems and applications focus on the process and not the employees who actually complete the processes. Here's a breakdown of the key value propositions:

Unified View & Orchestration:

Single Pane of Glass: By routing all work, including interactions and tasks, through a central platform, businesses gain a holistic view of customer journeys. This eliminates information silos and facilitates seamless handoffs, ensuring agents have a complete context for each interaction.

End-to-End Journey Orchestration: Routing extends beyond initial contact, allowing for the orchestration of the entire customer journey. This enables automated routing of tasks based on specific needs, ensuring prompt resolution and a consistent experience across touchpoints.

Enhanced Efficiency & Faster Resolution:

Automation: Effective routing connects and automates tasks between agents and backend systems (e.g. CRM, ERPs), streamlining workflows and minimizing manual processes. This translates to faster resolution times for customer issues, improving overall satisfaction.

End-to-End Observability & Management: Real-time visibility into the entire service process, facilitated by effective routing, enables proactive identification of bottlenecks. This allows for targeted interventions and resource allocation, optimizing agent utilization and reducing wait times.

Proactive Planning & Improved Customer Experience:

Accurate Forecasting & Scheduling: By analyzing historical data and routing patterns, businesses can accurately forecast workload and schedule agents accordingly. This proactive approach ensures adequate resources are available to meet customer demands, minimizing hold times and frustration.

Eradicating Bottlenecks: Effective routing helps identify and eliminate bottlenecks throughout the customer journey. This proactive approach ensures a smooth and seamless experience for customers, preventing frustration and fostering positive brand perception.

Strategically routing work into the contact center goes beyond simply connecting agents with customers. It unlocks a comprehensive framework for optimizing agent efficiency, streamlining operations, and ultimately, delivering an exceptional 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 Agent Competency	Increase throughput, utilization, and efficiency in agents' work, by delivering the tasks to the agents UI (User Interface) in push mode via screen pop together with interaction context and history in blending mode. Improve work item handling agility through the display of task-related external documents, references, and contextual information together with the work items
Improved Customer Experience	Deliver committed workitems on time and provide better quality answers by better matching work-types to employee skill sets
Improved Employee Attrition Rate	Offer fair balance of workload among all available resources
Improved Employee Occupancy	Improve occupancy by reducing idle time and reducing handling time (AHT) through automated work item routing distribution based on work item attributes and agent/employee skills
Improved First Contact Resolution	Provide more timely and complete insights through distribution of tasks with the full customer context
Reduced Administration Costs	With automated workitem distribution, supervisors reduce the time spent doing manual work allocation, one-to-one agent/employee monitoring and manual scheduling and reporting

Summary

Genesys Work Automation is a modern, cloud native approach to workitem routing and process automation purpose built for Genesys Cloud. It is intended for work that originates from the contact center to be easily tracked, automated and forecasted for agents.

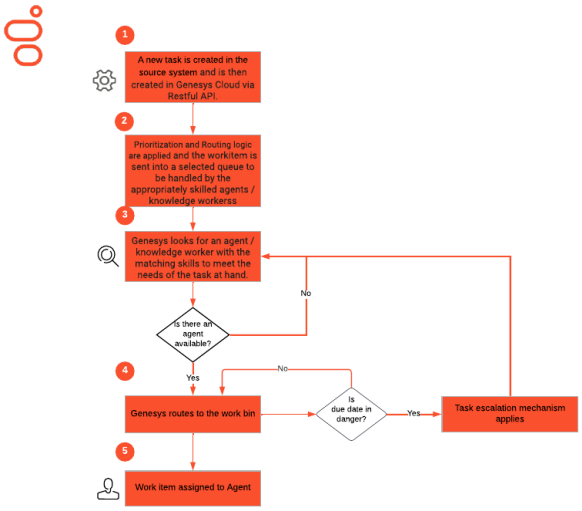
Genesys Work Automation enables effective management and distribution of work items and high value leads in the contact center. This distribution occurs across multiple departments to the best-suited agent, based on business segmentation, resource skills, and availability.

Genesys can receive and capture work from multiple source systems. The work item will be created and assigned to a pre-defined work type based on the business logic created. Tasks can be distributed to workbins where agents and supervisors can fetch tasks from there or can also be automatically assigned to an agent.

Use Case Definition

Business Flow

Work Automation - Business Flow



Business Flow Description

1. A new task is created in the source system (BPM, CRM, or Workflow) and is then created in Genesys Cloud via Restful API.
2. Based on predefined business logic from the known worktype, prioritization and routing logic are applied and the workitem is sent into a selected queue to be handled by the appropriately skilled agents.
3. Using any number of different routing methods, Genesys looks for an agent / knowledge worker with the matching skills to meet the needs of the task at hand. Should no agents be immediately available, business logic may be defined to increase the priority of the waiting workitem, change queues, or even sent alerts to supervisors who may help get the work assigned.
4. If the task is not handled within the time threshold (calculated as a percentage of the SLA), the task is sent back to Genesys for escalation handling. Escalation handling may include:
    1. Distribution to another agent / agent group workbin, or
    2. Distribution to a supervisor workbin

    - Tasks continue to be reprioritized at regular intervals, even if they are distributed to a workbin, to ensure that their priority reflects the proximity of the due date.
5. Genesys Work Automation supports two different workflows:
    1. Push - Agents are assigned the work item, get notified of the new assignment, and work directly on it on the Genesys UI. Genesys supports both automated assignment via routing or manual assignment from the task list.

2. Pull - Agents can view all work item in a work bin and select from the list which task they want to work on.
   For both Push and Pull use cases, when the work is completed, Genesys generates a trigger for the source system to synchronize any changes in attributes to the source system and closes the task.

Business and Distribution Logic

Business Logic

Refer to Additional Documentation section for resources on configuring the business logic for this use case.

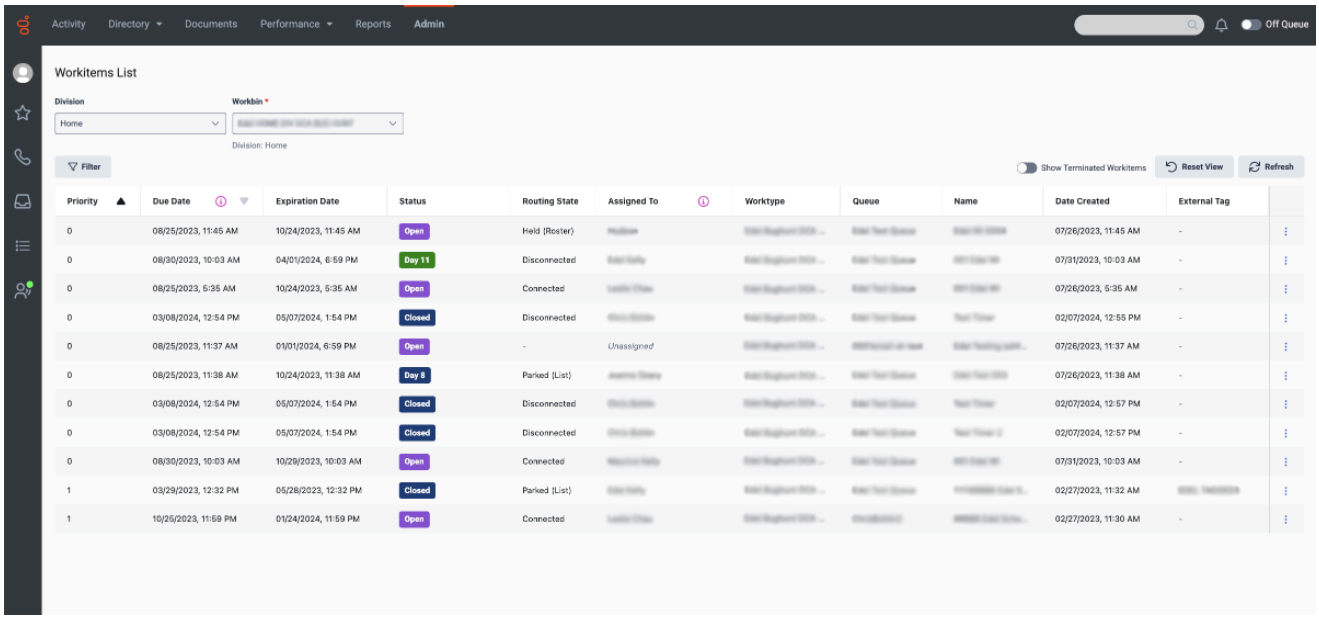
Distribution Logic

Refer to Additional Documentation section for resources on configuring the distribution logic for this use case.

User Interface & Reporting

Agent UI

This use case requires the Agent using the Agent UI with the Task List:



Reporting

Real-time Reporting

N/A

Historical Reporting

N/A

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	**Digital** • Genesys Email Routing (CE16)	None

General Assumptions

- There is no direct migration path from iWD and IPA to Work Automation.
- Work Automation will enable CX Evolution for iWD and IPA customers. Customers will likely need to re-engineer their workflows and implementations to adapt to Work Automation.
- Implementation of the business process and prioritization logic are supported through Architect and Work Automation Triggers.
- Network communication between Genesys and the source of external contextual data is enabled.

Customer Responsibilities

- Work Automation use case with tasks arriving from a source system use a provisioned bi-directional REST capture point.
- The customer handles the Genesys Work Automation integration of the source system.
- Any source-system changes needed for the integration with Genesys are within the customer responsibility.
- The source system must support the update of work items in Genesys Work Automation as required by the work item life cycle (complete, update, pause, resume, cancel, and so on).
- Work items appear in this use case as the "workitem" media type
- Customer has reviewed the Work Automation roadmap to align their CX Evolution timelines with Work Automation roadmap.

Related Documentation

Genesys Cloud Routing Methods

Genesys Cloud ACD uses a queue’s routing method to determine how to match interactions and agents. When using a skills-based routing method, the evaluation method determines how Genesys Cloud processes skill requests for interactions. A customer can request skills, for example, from the IVR. The evaluation method (when used) and the routing method for the queue determine the way that Genesys Cloud matches the interaction with an agent.

- https://help.mypurecloud.com/articles/acd-evaluation-routing-methods/
- https://help.mypurecloud.com/articles/advanced-routing-overview/

Workflows and business logic

Administrators can launch workflows to automate workitems using Architect and Triggers.

- https://help.mypurecloud.com/articles/work-with-workflows/
- https://help.mypurecloud.com/articles/about-triggers/

Document Version

- Version **v1.0.0** last updated **June 30, 2026**

Genesys Customer Authentication (CE07) for Genesys Cloud

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.

Link to video

Other offerings:

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
- 7 Related Documentation
  - 7.1 Document Version

Use Case Overview

Story and Business Context

Smart contact center software knows who’s calling. Genesys Cloud CX identifies customers based on their caller ID or prompts the customer for identifying information. This information is passed throughout the call flow for progressive identification and verification — so your customers don’t have to repeat themselves and your agents can start solving problems faster.

Use Case Benefits*

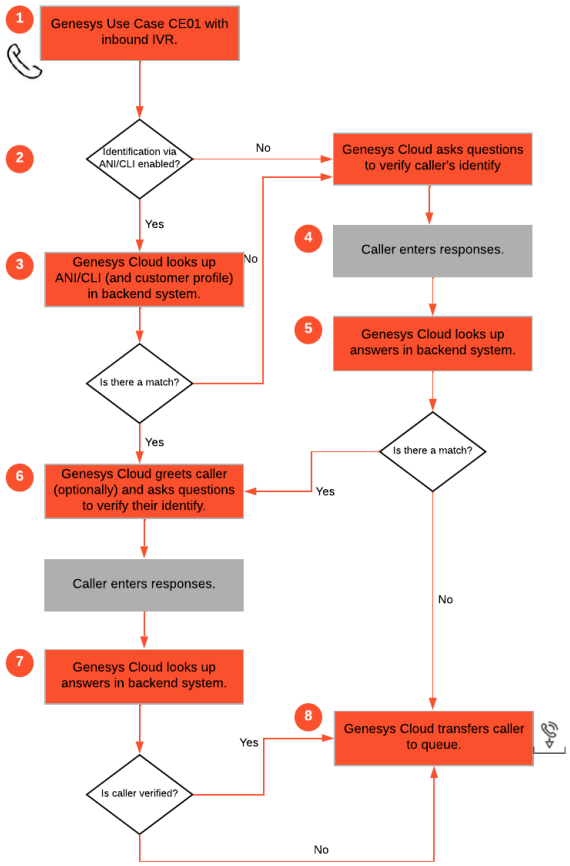
The following benefits are based on benchmark information captured from Genesys customers and may vary based on industry, lines of business or Genesys product line:

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 and by extending a more personal approach offered by agent (knowing who the customer is)
Reduced Handle Time	Reduce agent handled time due to a partial automation call 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

Use Case Definition

Business Flow



Business Flow Description

1. The IVR answers a call.
2. If enabled, Genesys Cloud CX identifies a customer using the Automatic Number Identification (ANI) / Caller Line Identification (CLI). BL1
3. If ANI / CLI are available, Genesys Cloud CX performs a lookup in the company's back-end system (for example, the CRM) to identify the caller.
4. If identification via ANI / CLI is disabled or fails, Genesys Cloud CX asks for a separate Identifier (for example customer ID, account number, tracking number, or alternate phone number) to identify the customer. The caller must respond to this question by entering a numeric value. If the customer does not have the required information, they can opt out and proceed down an unauthenticated path.
5. The customer input is validated against the enterprise/organization's back-end system (for example, the CRM). If a match cannot be found, Genesys Cloud CX asks the customer for their identifier. Genesys Cloud CX requests this information up to a maximum of three times after failure. The number of retry attempts is configurable. If Genesys Cloud CX cannot successfully validate the customer, the customer is transferred to a queue for agent-assisted service.
6. If needed for security purposes, Genesys Cloud CX can ask for additional information to validate the caller's identity. The caller must respond to this question by entering a numeric value.
7. Genesys Cloud CX validates the information entered against the organization's back-end system (for example, the CRM). If this validation is unsuccessful, Genesys Cloud CX asks the customer for security information again, up to a maximum of three times after failure. The number of

retry attempts is configurable. If Genesys Cloud CX cannot successfully validate the customer, Genesys Cloud CX transfers customer to a queue for agent-assisted service.

8. After successful identification and verification, Genesys Cloud CX transfers the call to the next step of the overall call flow. This step could be an agent-assisted service or a self-service application. To simplify subsequent interactions during this call, Genesys Cloud CX retains the customer identifier and verification status. Later Genesys Cloud CX can display this information to an agent by using scripts.

Business and Distribution Logic

Business Logic

Parameters and Business Rules

- **Customer identification by ANI / CLI** - Step 3 in the business flow can be enabled or disabled depending on specific business requirements. If this step is disabled, the flow always asks for a customer identifier. (for example customer ID, account number, or tracking number.) You can set this parameter for each company service line.
- **General: Voice Prompts** - The business can configure all voice prompts within this flow.

Distribution Logic

There is no applicable content for this section.

User Interface & Reporting

Agent UI

If Genesys Cloud CX transfers the call to an agent, the agent receives an indication whether the customer is:

- Identified and verified
- Identified only
- Not identified or verified

If they are available in the back-end system, Genesys Cloud CX displays the customer's identifier and name.

Reporting

Real-time Reporting

Due to the continuous evolution, the features available in Genesys Cloud CX rapidly change. See the Genesys Cloud CX Resource Center for latest features at http://help.mypurecloud.com.

The following are examples of Genesys Cloud CX Historical and Real-time views that provide relevant insights:

- Agent
  - Agent views provide metrics on agent status, agent performance, agent interactions, and other metrics to understand agent activity. Filters include skills, languages, wrap-up codes, and more.
- Queue
  - There are several views that provide insight into both real-time and historical queue activity.
  - The Queue Activity view shows real-time metrics, including all calls that are currently waiting on and interacting with agents.
- Interactions
  - The Interactions view provides detailed information on both historical and real-time interactions.
  - It allows supervisors to filter interactions based on metrics including agent names and wrap-up codes.
- Reports
  - Genesys Cloud CX has a full library of canned reports available in .pdf and .xlsx formats.
  - Supervisors can filter these reports by dates, users, queues, and so on.
  - Supervisors can download reports from the Genesys Cloud CX user interface.
  - Supervisors can schedule reports to run and download in batch.
- Other Views
  - WFM
  - Quality
  - Outbound
  - Scheduled Callbacks
  - Campaigns
  - And more

Historical Reporting

Same as real-time 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
Inbound • Genesys Personalized Routing with Callback (CE43)	None	None	None

General Assumptions

- Identify the customer using the businesses publicly available REST endpoint. This endpoint must provide the appropriate web services and must be web accessible.
- Validate the customer's identity using the publicly available REST endpoint that the business provides.
- The business must either have a unique identifier or a phone number for each customer used for identification.
- If the business requests customer entries, the unique identifier must be numeric.

Related Documentation

Document Version

- Version **V 1.0.2** last updated **June 30, 2026**

Genesys Voice Payment (CE08) for Genesys Cloud

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.

Link to video

Other offerings:

-

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
- 7 Related Documentation
  - 7.1 Document Version

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:

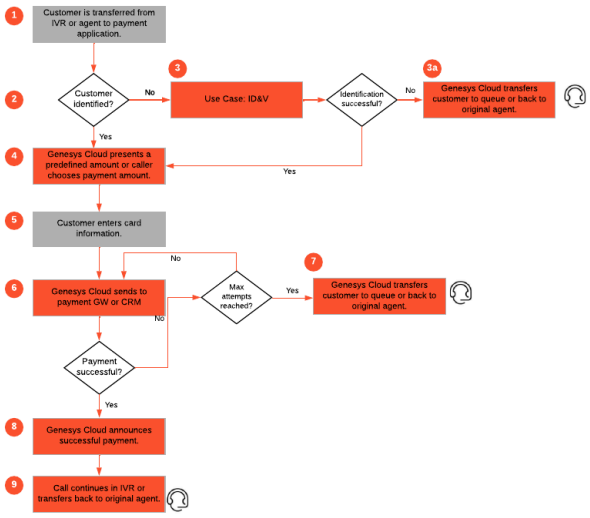
Use Case Benefits	Explanation
Improved Customer Experience	Offer customers the option of agent-assisted or fully automated phone payments.
Improved First Contact Resolution	Improve the accuracy and efficiency of payments by phone.
Increased Revenue	Improve revenue collection through speed to market and established best practice.
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 PA-DSS certified application) and exposure to PCI compliance issues due to manual handling of credit card payments

Summary

Allows companies to add a PA-DSS certified payment capture IVR application to a call flow to capture payments quickly. The payment capture IVR application integrates with a third-party payment provider to complete the payment. The payment capture IVR application includes automatic card type detection. It also applies appropriate rules for collection and validation of the card data. Payments can be agent-assisted or fully automated.

Use Case Definition

Business Flow



Business Flow Description

1. A customer is transferred to the payment capture IVR application. This transfer can occur either from another IVR application (outside of the scope of this use case) or by an agent who initiates a secure payment transfer. When an agent transfers a customer to the secure payment capture IVR application, the agent is temporarily removed from the call and is unable to listen to the conversation. In Genesys Cloud CX, the agent remains reserved to resume the call after the payment processing is completed.
2. Genesys Cloud CX checks whether the customer has been identified. If not, Genesys Cloud CX routes the customer to a separate application for identification and verification. This functionality is covered by a separate use case, .
3. If identification and verification succeeds, the customer moves to the next step. If not:
    - If the payment attempt is fully automated, the customer is transferred to a queue with context for manual processing by an agent.
    - If the payment attempt is agent-assisted, the caller is transferred back to the agent and the customer and agent continue their conversation.
4. Genesys Cloud CX prompts the caller with the payment amount. This amount could be any of the following:
    - Retrieved by the IVR via a data dip (outside of the scope of this used case)
    - Based on what an agent has entered before initiating the payment capture IVR application
    - Entered by the caller. If this is the case, Genesys Cloud CX enables the customer to enter a payment amount. (If the payment attempt is agent assisted, only

DTMF input is permitted). 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 retrieved from the IVR or the agent.

5. The customer enters their card number.
    - Genesys Cloud CX checks via the integration whether the card number is valid and what type of card it is. Depending on the type of card, the customer is requested to provide further details (such as expiration date and/or CVV code).
    - After every field entry (for example, card number, expiration date, and CVV code), the entry is read back and the customer confirms or re-enters the entry.
6. Genesys Cloud CX accesses the payment gateway or CRM to process the payment. This will either be rejected or successful.
7. If rejected, the customer can re-enter their card details until the maximum number of rejections is met, at which point:
    - If the payment attempt is fully automated, Genesys Cloud CX transfers the customer to a queue with context for manual processing.
    - If the payment attempt is agent-assisted, Genesys Cloud CX transfers the caller back to the agent, and the customer and agent continue their conversation.
8. If the payment is successful, Genesys Cloud CX 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.
9. If the payment attempt is fully automated, the call continues in the IVR application. If the payment attempt is agent-assisted, the caller can be transferred back to the original agent (optionally). The result of the payment is attached to the call for further processing.

Business and Distribution Logic

Business Logic

Parameters to be Passed to the Payment Application

The payment capture IVR application requires the following parameters:

- Customer or Account Identifier (recommended)
- Outstanding Balance or Payment Amount (recommended)
- Payment Reference (optional)

Configuration Settings

The following parameters are configurable within the system:

- The maximum number of declined payments allowed before exiting the flow
- The allowed cards for payment (such as Amex and Visa)
- The currency of the payment
- Setting and details on the payment provider
- Optionally a minimum payment amount in case the customer can specify the payment amount. For payment requests below this amount, there is an error flow where the application asks the customer to enter the amount they want to pay.
- The result to return when the customer reaches the maximum attempts, possibly to send the call to an agent, or initiate some other handling

Distribution Logic

There is no applicable content for this section.

User Interface & Reporting

Agent UI

Use Genesys scripts to create an action to start a payment transfer. The scripts pass data for payment amount and other details that are required to complete the secure payment transaction.

Reporting

Real-time Reporting

Conversations for which an agent started a secure IVR Flow have a specific IVR segment on the conversation. The Interaction view shows this specific segment on the conversation. Conversations

that involve a transfer from the IVR into the payment provider shows the payment provider's IVR as a separate IVR segment on the conversation.

Historical Reporting

Same as real-time 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
Inbound • Genesys Call Routing (CE01) **Self-Service and Automation** • Genesys Customer Authentication (CE07)	None	None	None

General Assumptions

- The customer / partner provides the integration between Genesys Cloud CX and the payment Gateway (or the CRM or another system that processes the payment)
- Requirements for the payment provider:
  - REST-based API for payment integration
- Certification of the full PCI environment is outside the scope of this use case.
- Audio Prompts:
  - Genesys recommends that pre-recorded prompts be used for any dynamic playback of information such as payment amounts, dates, or order numbers, as these prompts provide a better caller experience than using text-to-speech.
  - TTS is optional for playback of prompts.
- Input modes:

  - If the agent starts the payment capture by conferencing the customer with the IVR, customer inputs are DTMF only.
  - If payment capture is started from IVR, customer inputs are using DTMF.
- Enabled organization for PCI.

Related Documentation

Document Version

- Version **V 1.0.2** last updated **June 30, 2026**

Genesys Outbound Dialer (CE11) for Genesys Cloud

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.

Link to video

Other offerings:

-
-

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 Flow
  - 4.3 Business Flow
  - 4.4 Business and Distribution Logic
- 5 User Interface & Reporting
  - 5.1 Agent UI
  - 5.2 Reporting
- 6 Customer-facing Considerations
  - 6.1 Interdependencies
- 7 Related Documentation
  - 7.1 Document Version

Use Case Overview

Story and Business Context

A company must make outbound calls to start contact with its customers which are based on specific business rules for sales, marketing, care, or collections. This use case describes the ability to configure and run outbound dialing campaigns – both automated and agent-assisted – based on customer-provided contact lists.

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

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

Improved Effectiveness / Higher Return on Investment

- Improved Return on Investment of outbound sales and marketing campaigns (for example telemarketing; upsell/cross-sell; customer win-back; loyalty/promotions)
- 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 preview dialing modes instead of making manual dials and outbound call volume is efficiently paced. The various dialing modes result in more sales conversations and increases agent productivity
- Companies are using multiple channels

Happier Agents

- Automated channels are used when appropriate to improve agent efficiency and satisfaction by removing low value calls and wasted time
- Productive and highly utilized agents have more opportunities to close business and meet their sales quotas

Happier Legal Team

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

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 improve through the ability to automatically generate outbound calls and empowering agents with single searchable desktop application that shows customer context.
Improved Employee Utilization	Use agents/employees for outbound campaigns. Optimize the number of agent-handled calls by increasing the number of Right Party Contacts through predictive dialing.
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	Send communications proactively through outbound channels. Drive inbound calls by using agent or automated messaging and CID.

Summary

The Genesys system supports both agent-assisted and automated outbound call campaigns in various dialing modes, including predictive, power, progressive, preview, and agentless. Companies tell Genesys which consumers they want to contact. Companies blend contact strategies and escalate outreach attempts from automated calls to agent-assisted. The system records delivery results for use in reports.

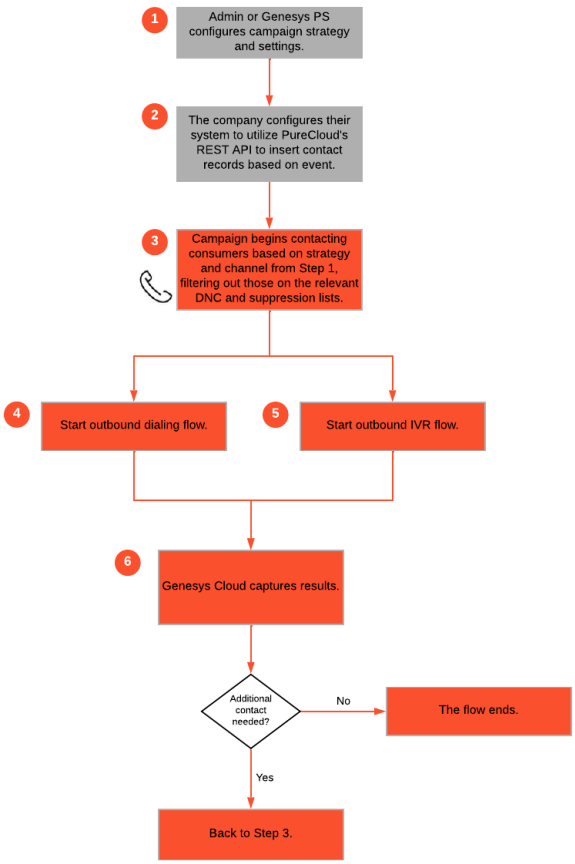
A company can use its marketing, CRM, or collections system to generate contact lists based on a one-time event, recurring events, or trigger-based events. The contact lists include the appropriate contact details, such as contact name, contact phone number, and contact reason. The system records delivery results for use in reports.

Sales and lead development reps are manually dialing customers and prospects for sales and marketing purposes, which are 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)

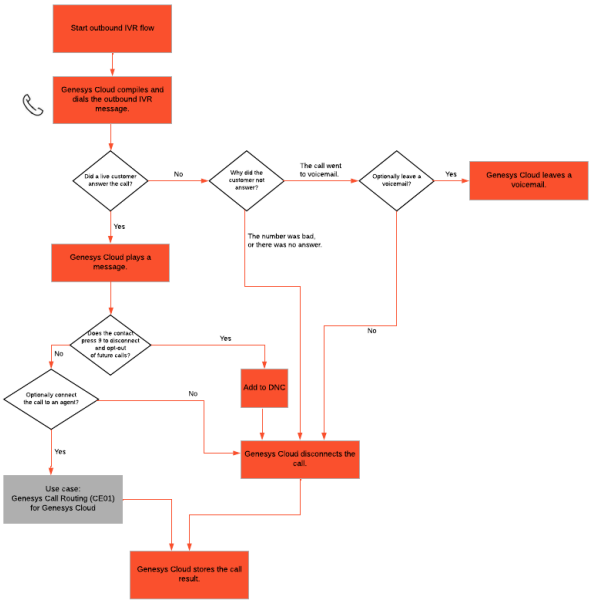


Business Flow Description

1. An admin (or Genesys PS) configures the campaign strategy and settings in Genesys Cloud CX.
2. The admin loads the contact(s) in Genesys Cloud CX. This is done either manually via a .csv file or via the API.
3. The campaign begins contacting consumers based on the campaign strategy set in Step 1. Before starting a call, Genesys Cloud CX checks each contact or record against the associated Do Not Call lists. Genesys looks at the callable time set or the time zone mapping (depending on the customer's preference), and any other custom rules the customer has designed. (BL1, BL2)
4. The person constructing the campaign in Genesys Cloud CX configures the dialing mode as Preview, Progressive, Power, Predictive, or Agentless - see Outbound Dialing Flow for details
5. For an outbound IVR, there are several possible results (BL1, BL2, DR1) - See Outbound IVR flow for details
6. Based on the call result, Genesys Cloud CX may make additional attempts to reach the contact in the same channel. This is configured in the campaign settings in Step 1 of this use case. (DR1)

Business Flow

(2) Outbound IVR Flow

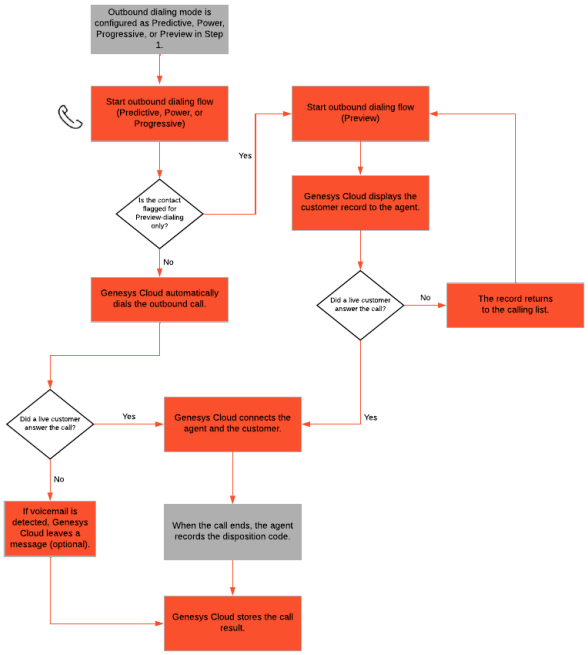


Business Flow Description For an outbound IVR, there are several possible results (BL1, BL2, DR1):

- Bad number or no answer
  - The call disconnects.
  - Genesys Cloud CX automatically stores the call result.
- Answering Machine
  - The call either disconnects, is sent to a queue to be handled by an agent, or a message is played (based on the chosen configuration in Step 1).
  - Genesys Cloud CX automatically stores the call result.
- Live party connect
  - The call plays the outbound IVR message.
  - The contact can opt out of future calls. To do this, include the IVR option, “Press 9 to opt out of future calls.”
  - (Optional) The customer's admin can offer the option to connect to a live agent (based on the chosen configuration.) To do this, include the IVR option, “Press 2 to connect to a live agent” and then route calls to a phone number provided by the company.
  - If the contact does not choose to connect to a live agent, the call disconnects.
  - Genesys Cloud CX automatically stores the call result.

Business Flow

(3) Outbound Dialing Flow



Business Flow Description The person constructing the campaign in Genesys Cloud CX configures the dialing mode as Preview, Progressive, Power, Predictive, or Agentless:

- In Preview mode, the agent receives or retrieves a record and initiates the call. An optional timer automatically launches the call for the agent.
- In Progressive mode, Genesys Cloud CX automatically places the call-based agent availability for the specific campaign. Call analysis ensures connections (human or machine answers).
- In Power mode, Genesys Cloud CX automatically places calls in parallel based on a pacing algorithm that determines when an agent is available.
- In Predictive mode, Genesys Cloud CX automatically places the call based on the pacing algorithm and expected agent availability.
- In Agentless mode, Genesys Cloud CX automatically places calls based on the number of lines specified in the campaign settings. Depending on whether a machine or live person answers the call, the call can either be transferred to an outbound flow (IVR) or disconnected.
- For each call attempt, there are several possible results:
  - Bad number or no answer:
    - In Preview mode, the agent hangs up and chooses a wrap-up code that Genesys Cloud CX stores with the call record.
    - In Progressive, Power, Predictive, or Agentless modes, the call disconnects and Genesys Cloud CX automatically stores the call result.
  - Answering machine:
    - In Preview mode, the agent can optionally leave a message. Based on the wrap-up code chosen by the agent, Genesys Cloud CX could try the call again later. Genesys Cloud CX automatically stores the call result.

Business and Distribution Logic

Business Logic

BL1

Contact Records

The admin loads the contacts in Genesys Cloud CX. Genesys does not configure the API calls from external systems to add contacts. A custom solution can do this work as a custom SOW at extra cost.

Agentless Campaigns

The customer can configure their campaigns with various dialing modes, including Agentless (IVR). The customer or Genesys PS configures the dialing mode of a campaign before uploading the contact list. The admin or Genesys PS also configures any pre-recorded messages and IVR flows for automated outbound calls.

Campaign Settings

The customer admin or Genesys PS configures various campaign settings such as:

- Scheduling
- Maximum attempts
- Do Not Call (DNC) options
- Default* agent script
- Contact list
- Pacing
- Rule sets
- Priority
- Sorting (Dynamic or Static)
- Caller ID
- Filter
- ACD queue
- Time zone mapping

*More advanced scripts are part of the Genesys services catalog.

- In Progressive, Power, Predictive, or Agentless modes, the call can be disconnected, sent to an agent's queue, or sent to the outbound Architect flow (IVR) to hear a message (based on the chosen configuration in Step 1). Genesys Cloud CX automatically stores the call result.

- Live party connect:
  - The call plays the outbound IVR message.
  - The contact can opt out of future calls. To do this, include the IVR option, “Press 9 to opt out of future calls.”
  - (Optional) The customer's admin can offer the option to connect to a live agent (based on the chosen configuration.) To do this, include the IVR option, “Press 2 to connect to a live agent” and then route calls to a phone number provided by the company.
  - If the contact does not choose to connect to a live agent, the call disconnects.
  - Genesys Cloud CX automatically stores the call result.

Dialing Mode: Preview, Progressive, Power, Predictive, Agentless

A customer can choose to run outbound dialing campaigns using Preview, Progressive, Power, Predictive, or Agentless modes. Either the customer admin or Genesys PS configures the campaign. A customer can also designate specific contacts to always be dialed in Preview mode (Precise Dialing). Preview mode ensures that an agent is available when the specific customer answers.

If Preview mode is used, customers can assign ownership to an agent so they will only those records. This is helpful by combining several individual campaigns into a single one.

Answering Machine Detection (AMD

Call analysis (CPD) that includes AMD detects whether an answering machine or a live person is answering the phone before connecting the call to an agent. A customer can also choose whether to disconnect, play a message, or send the call to an IVR flow when a call connects. A customer can also disable AMD for compliance reasons, or if the customer wants to have agents handle all connected calls to ensure that an agent is available when the customer answers.

BL2

DNC Lists

Do Not Contact lists should include customers who have opted out of previous campaigns and a country-specific DNC list (if applicable). A customer can apply multiple DNC lists to a campaign. When a consumer opts out of a campaign, they should be added to the DNC list. Customers can also upload another DNC list or add an individual to an existing DNC list. These suppression lists can then be applied to future campaigns at the campaign level. DNC lists can also be outsourced to one of our integrated partners, DNC.com, or Gryphon Networks. They can manage their subscriptions to those services and customize several options including wireless and VoIP identification.

For internal DNC lists, users can now set an expiration time/date for a DNC record. After this time, the system will ignore the entry and proceed with making an attempt. Our DNC.com integration features the ability to block restricted days such as state holidays as well as specific time of day restrictions.

Personalization

For Agentless (IVR) campaigns, the content of the messaging can be personalized (TTS audio).

Distribution Logic

DR1

Agentless - Connect to Agent Option

Agentless option requires implementation of Inbound, please see the Use Case Interdependencies section.

User Interface & Reporting

Agent UI

- The agent must be able to add contacts to the Do Not Call list (DNC) or to make the contact uncallable via the agent script or wrap-up code.
- The agent must be able to enter a wrap-code for each call (such as Cross Sell, Need Follow Up, Not Right Skill, Processed, Stopped, Transferred, Up Sell). The Customer Admin or Genesys PS configures the wrap-up codes (included within the corresponding use cases).

Reporting

Real-time Reporting

Use Genesys Cloud CX Performance dashboards and views for real-time reporting on active outbound campaigns. Use agents for outbound dialer campaigns and improve campaign performance.

- Watch campaigns run in real time on Performance Outbound Campaigns dashboards. Monitor connect rates, abandoned calls, and the progress of each running campaign. Select a campaign on the Campaigns dashboard page and observe the number of idle agents, the abandon rates compared with target rates, number of calls blocked by Do Not Call lists etc. The Outbound campaign details view shows campaign statistics, wrap-up call details, live or historical interactions, and scheduled interactions for a campaign.
- See detailed information on agent metrics to improve the performance of outbound campaigns. View a list of outbound campaign interactions specific to an agent in Agents Interactions Detail view, and monitor successfully completed sales in Agents wrap-up Detail view.
- View in-progress and completed interactions associated with outbound campaigns in Interactions view. This view displays interactions associated with multiple campaigns and outbound interactions associated with selected contact lists.
- See Queues Interactions Detail view, in Performance Queues, for in-progress and completed interactions associated with outbound campaigns for specific queues and selected contact lists.

Historical Reporting

To improve performance of outbound campaigns, use Genesys Cloud CX reports to see past metrics and data for your dialer campaigns.

- The Dialer Campaign Detailed Attempts History report displays outbound interaction attempts for one or more campaigns during a specific date and time range. It contains information such as caller ID number and name, the total amount of time spent on wrap-up for the interaction, and the amount of time between the customer answering the call and the call transferring into an outbound flow.
- The Dialer Campaign Success Results by Interval report includes totals for the interval, by day, for the number of dials, contacts, and abandons for the campaign. If a report includes more than one dialer campaign, the report aggregates the totals for all the campaigns. The report includes the percentage of: contacts compared with the calls placed, abandoned calls compared with the calls placed, and abandoned calls compared with the number of contacts.

- The Dialer Campaign Success Results by Day report displays a daily breakdown of the results for one or more dialer campaigns during a specific date range. The report includes weekly and monthly totals for the number of dials, contacts, and abandons for the campaign. The report includes the percentage of: contacts compared with the calls placed, abandoned calls compared with the calls placed, and abandoned calls compared with the number of contacts.

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	**Inbound** • Genesys Personalized Routing with Callback (CE43)	None

Customer Responsibilities

- The customer provides Genesys with the contact list from their own CRM, marketing, or collections database. This contact list can be either a flat file or an on-demand trickle-feed that applies the Genesys Cloud CX REST API. Note: development work to write against the API is not included as part of this use case.
- The customer is responsible for recording and providing any required announcements and recordings[LF1].
- The customer handles compliance as follows:
  - The customer has acquired the proper level of express opt-in consent from its contacts to receive Sales and Marketing calls and automated messages.
  - The customer maintains an auditable list and honors opt-out requests.
  - The contact lists that are loaded into Genesys Cloud CX contain only customers to whom calls can be made according to the corresponding local compliance rules.
- The outbound solution can be configured based on the customer's understanding and direction of compliance with local outbound calling regulations at the site of the installation. The customer is responsible for compliance with laws and regulations regarding outbound calling and automatic dialing. It is recommended that the customer's legal department confirms that the organization is in full compliance with these regulations.

Related Documentation

Document Version

- Version **V 1.1.3** last updated **June 30, 2026**

Genesys SMS & Email Notifications (CE12) for Genesys Cloud

Use SMS and email to send personalized, timely and relevant notifications to customers.

What's the challenge?

Companies want a quick way to engage with their customers to notify them of appointment reminders, delivery notifications, fraud alerts, coupons, loyalty program information, surveys and much more. Repeated handling of unnecessary outbound calls and preventable inbound follow-up drives up costs and can damage customer and employee satisfaction.

What's the solution?

Communicate important information simply and efficiently using Genesys SMS / Email Notifications. Customers experience a more satisfying and engaging experience with businesses. And companies reduce operational costs while ensuring important and time-sensitive digital alerts are delivered to customers wherever they are.

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 Flow
    - 4.3 Business Flow
    - 4.4 Business and Distribution Logic
- 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

Consumers want businesses to send them proactive notifications when that information is personalized, timely, and relevant. Automated notifications are an efficient, quick way to notify customers of appointment reminders, delivery notifications, fraud alerts, coupons, loyalty program information, surveys, and much more. Many companies struggle with adding the SMS channel to their outbound notification strategy for marketing, care, or collections. This use case offers the ability to configure and execute outbound SMS / Email campaigns.

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, close rates, cross-sells, and up-sell rates improve through the ability to automatically generate outbound messages and empower agents with a single searchable desktop application that shows customer context.
Improved Customer Experience	Improve Net Promoter Score (NPS) by proactively notifying customers through SMS and email interactions.
Improved Employee Occupancy	Reduce agent-assisted outbound calls by automatically sending communications through SMS and email.
Reduced Volume of Interactions	Decrease inbound interactions by proactively sending communications through SMS and email.

Summary

This use case illustrates how companies proactively send customers notifications using SMS or email for marketing, care, or collections purposes. The company can use its marketing, CRM, or collections system to generate contact lists to generate an SMS or email campaign. The lists can include the appropriate contact details, such as contact name, mobile phone number, email address and contact reason. The system records delivery results to feed into reports. Public APIs are useful to send a message based on a one-time event, recurring events, or trigger-based events without needing to build and maintain a traditional "blast" campaign.

Outbound SMS / Email notification examples include:

Financial Services	Telecom	Healthcare	Utilities
• New customer engagement • Replenish prepaid card reminders • Payment reminders • Fraud alerts	• Going over plan alerts • Payment reminders • Upgrade eligibility • Customer win -back	• Appointment reminders • Wellness updates • Refill prescriptions • Claim status updates	• Service call confirmation • Planned downtime • Outage status • Payment reminders
Retail	**Insurance**	**Collection Agencies**	**Travel and Hospitality**
• Promotional Messaging • Order confirmations • Product recalls • Loyalty program activity	• Quote follow-up • Payment reminders • Claims status updates • Renewal notice	• Payment reminders • Late payment alterations • Payment confirmations	• Booking confirmation • Upselling service • Payment reminders • Travel updates • Loyalty program activity

Use Case Definition

Business Flow

(1) Trigger-based SMS / Email

Business Flow

(2) Campaign-Based SMS

Business Flow

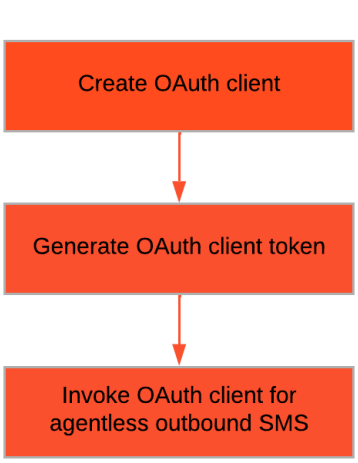
(3) Campaign-Based Email

Business and Distribution Logic

Business Logic

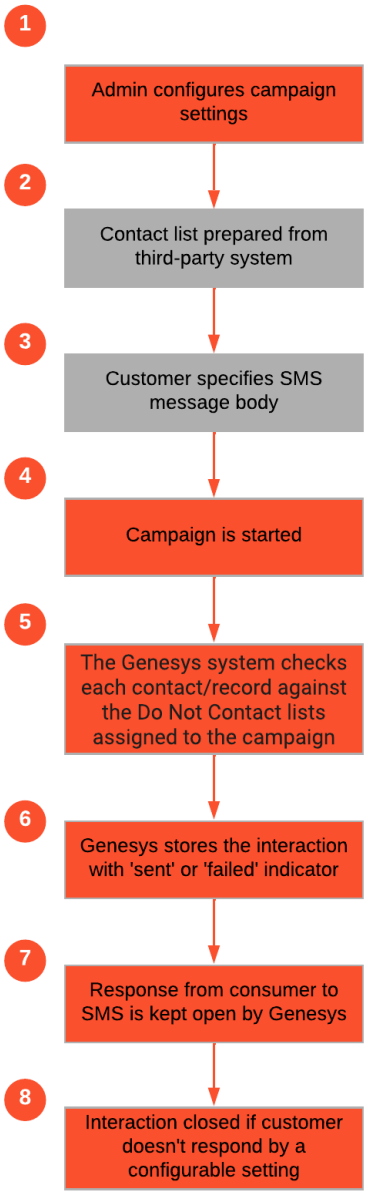
Agentless SMS and Email Notifications

Customers typically use agentless SMS / Email notifications when triggering a message based on an event such as: purchase, scheduled appointment, two factor authorization, and so on. The customer must have an external system invoking the API call to send the message. These trigger-based



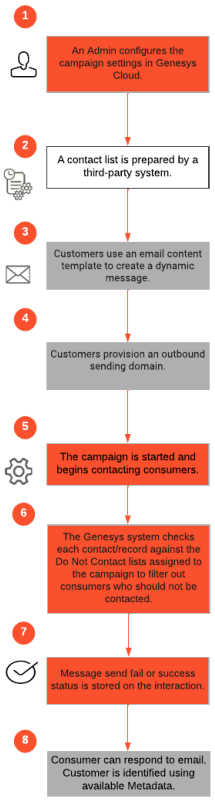
Business Flow Description

1. Create or use an existing OAuth client.
    - Customers will need an OAuth client with the appropriate permission assigned to the OAuth client. See link for more info.
2. Generate an OAuth client token
    - To call the endpoint to send agentless notifications, customers need to use an OAuth client to generate a token. They need to make sure to build the basePath for the correct Genesys Cloud region they are working in. For more information, see link.
3. Use the OAuth client token to call the agentless outbound endpoint. For more information reference the agentless SMS tutorial.



Business Flow Description

1. An Admin configures the campaign settings in Genesys Cloud.
2. The organization either prepares a contact list from a third-party system (such as CRM or Collections) or configures their system to use Genesys REST API to insert contact records.
    - Batch Upload Option: Customer contacts are loaded through the User Interface using a .csv file.
    - API Upload Option: Customer contacts are loaded through a Genesys Cloud CX API call. Customers can set a flag in the API to add the contact to the top of the list.
3. Customers can use a message content template to create a dynamic message using data from the contact list. Alternatively, The customer can specify the SMS message body for each contact record by assigning a column in the list as the message column. Best practice recommends that if hyperlinks are used in the message body that the total message content is no greater than 160 characters to avoid splitting the hyperlink across multiple text messages. The consumer's mobile phone provider determines the concatenation of an long message. Messages longer than 160 characters may be concatenated into one message by the mobile provider or may arrive as multiple messages.
4. The campaign is started and begins contacting consumers based on the settings configured in the first step.
5. The Genesys system checks each contact/record against the Do Not Contact lists assigned to the campaign to filter out consumers who should not be contacted.
6. Message send fail or success status is stored on the interaction.
7. Consumer may decide to respond to the SMS message. Responses will thread with the original outbound SMS message for a configured amount of time with the available metadata from the SMS message to identify the consumer.



- For a HELP keyword, a customer-specified help text is sent to the consumer.
- For a STOP keyword, a default or customer-specified text is sent to the consumer, and the mobile number is added to a suppression list by the aggregator so further messages are blocked by the aggregator.
- For a START or UNSTOP keyword, the aggregator begins allowing further messages to the consumer.

8. Interaction closed if customer doesn't respond by a configurable setting.

Business Flow Description

1. An Admin configures the campaign settings in Genesys Cloud.
2. The organization either prepares a contact list from a third-party system (such as CRM or Collections) or configures their system to use Genesys REST API to insert contact records.
   - Batch Upload Option: Customer contacts are loaded through the User Interface using a .csv file.
   - API Upload Option: Customer contacts are loaded through a Genesys Cloud CX API call. Customers can set a flag in the API to add the contact to the top of the list.
3. Customers use an email content template to create a dynamic message using data from the contact list.
4. Customers provision an outbound sending domain to be used on behalf of the campaign.
5. The campaign is started and begins contacting consumers based on the settings configured in the first step.
6. The Genesys system checks each contact/record against the Do Not Contact lists assigned to the campaign to filter out consumers who should not be contacted.
7. Message send fail or success status is

notifications are not sent all at once. As such, trigger-

based notifications do not use traditional outbound campaigns. However, they are included within interaction views and reporting.

Standard SMS Keywords

Standard opt-out keywords include STOP and UNSUBSCRIBE and additional variations including: END, QUIT, CANCEL and STOPALL

Standard help keywords include HELP and INFO.

Standard opt-in keywords include START, YES and UNSTOP.

SMS Campaigns

Contact List

- The organization either prepares a contact list from a third-party system (such as CRM) or configures their system to use Genesys Cloud CX APIs to insert contact records.
- Batch Upload Option: Customer contacts are loaded through the User Interface using a .csv file.
- API Upload Option: Customer contacts are loaded through a Genesys Cloud CX API call. Customers can set a flag in the API to add the contact to the top of the list.

Campaign

- The campaign is started and begins contacting consumers based on the campaign settings configured. The Genesys Cloud CX system checks each contact record against the Do Not Contact list(s) assigned to the campaign to filter out consumers who should not be contacted. The message body can be specified in a SMS campaign templated associated with the campaign. Alternatively, the customer can specify the SMS message body for each contact record by assigning a column in the list as the message column. Best practice recommends that if hyperlinks are used in the message that the total message content is no more than 160 characters to avoid splitting the hyperlink across multiple text messages.
- The consumer's mobile phone provider determines the concatenation of an long message. Messages longer than 160 characters may be concatenated into one message by the mobile provider or may arrive as multiple messages. Genesys stores the SMS sent success or failure status of a message on the interaction. Consumer may decide to respond to the SMS message. Responses will thread with the original outbound SMS message for a configured amount of time with the available metadata from the SMS message to identify the consumer. For a HELP keyword, a customer-specified help text is sent to the consumer. For a STOP keyword, a default or customer-specified text is sent to the consumer, the mobile number is added to a suppression list by the aggregator, and further messages are blocked by the aggregator. For a START or UNSTOP keyword, the aggregator begins allowing further messages to be sent to the consumer.

Email Campaigns

Contact List

- The organization either prepares a contact list from a third-party system (such as CRM) or configures their system to use Genesys Cloud CX APIs to insert contact records.

stored on the interaction.

8. Consumer may decide to respond to the email. Responses will thread with the original outbound email for a configured amount of time with the available metadata from the email to identify the consumer.

- Batch Upload Option: Customer contacts are loaded through the User Interface using a .csv file.
- API Upload Option: Customer contacts are loaded through a Genesys Cloud CX API call. Customers can set a flag in the API to add the contact to the top of the list.

Campaign

- The message body can be specified in an email campaign template associated with the campaign.
- The outbound domain used for sending messages is provisioned in Genesys Cloud.
- The campaign is started and begins contacting consumers based on the campaign settings configured.
- The Genesys Cloud CX system checks each contact record against the Do Not Contact list(s) assigned to the campaign to filter out consumers who should not be contacted.

Distribution Logic

There is no applicable content for this section.

User Interface & Reporting

Agent UI

N/A

Reporting

Real-time Reporting

Live messaging campaign information can be found on the Messaging Campaigns tab on the Campaign Management dashboard.

- Campaigns can be turned on/off
- Campaign progress is shown with the number of total contacts and the number of processed contacts
- Campaign attributes such as name, contact list, and division are also provided

Historical Reporting

Dialer Campaign Detailed Attempt History can be used to display the individual:

- Number of SMS attempts
- DateTime of SMS attempt
- Campaign and queue
- Contact ID

- Number of SMS messages rejected by the aggregator
- Number of SMS messages accepted by the aggregator

Further information about campaign results can be found by exporting the contact list such as:

- Records skipped, for example, the contact is listed on a "do not contact list" assigned to a campaign

Customers can have ultimate flexibility by using the Interactions View to show detailed results of a campaign, including applying filters and choosing data columns, and also export as .csv or .pdf.
Note: This view is the only method available to see details when using the agentless API method of sending SMS messages.

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 cannot use a third-party SMS / email aggregator.
- Our aggregator stores opt-out requests and blocks messages if a customer attempts to send them to a consumer. This is accomplished by the consumer using keywords such as STOP, STOPALL, UNSUBSCRIBE, CANCEL, END, or QUIT. If the consumer wants to resume messages (opt-in), they can use keywords such as START, YES, and UNSTOP. Genesys also supports custom keywords for opt-in and opt-out requests.
- For SMS campaigns, customers must acquire a short code in North America.

Customer Responsibilities

- Customer provides Genesys with the contact list from their own CRM, marketing, or collections database - either via uploading a .csv file in the user interface or using API endpoints to add contacts to a contact list.
- Compliance is handled by the customer. The customer has the responsibility for securing express consent from consumers (when required) before sending SMS messages, maintains an auditable list, and honors opt-out requests. The contact lists loaded into Genesys should contain only consumers to whom and when an SMS message can be sent according to the corresponding local compliance rules.

- The outbound solution is configured based on the customer's understanding and direction of compliance with local outbound SMS regulations at the site of installation as well as at the local regulations at the site of delivery of SMS messages. The customer is responsible for compliance with laws and regulations concerning outbound SMS and automatic sending of SMS. It is recommended that the customer's legal department assert that the organization is in full compliance with these regulations as SMS messages are sometimes considered the same as voice calls with regard to compliance.
- The sender number (dedicated short code or long code) is provisioned on the Genesys system.
- MMS is not included in the scope of this use case.
- For email campaigns, customers must provision an outbound domain in Genesys Cloud for sending emails on behalf of the campaign

Document Version

- Version **1.0.0** last updated **June 30, 2026**

Genesys Email Routing (CE16) for Genesys Cloud

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.

Link to video

Other offerings:

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
- 7 Related Documentation
  - 7.1 Document Version

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, systemizing automatic acknowledgment, and automating 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	Direct interactions to an expert through skills based routing improves First Contact Resolution
Reduced Handle Time	Standard response libraries improve consistency and reduce the time taken to compose responses to email inquiries. Automatic linking of emails to previous correspondence reduces familiarization and handling time for agents.

Summary

A customer sends an email to a company email address. Genesys Cloud CX receives the email and triggers an inbound email flow. The inbound email's flow can automatically reply to the customer to set expectations, or the flow can search basic keywords determine the correct routing. Genesys Cloud CX routes the email to the queue that corresponds to the email's "to" address and the matching keywords. The email is then distributed to the best available agent based on the required skills. When an agent receives the email, the agent sends an email reply to the customer. Genesys Cloud CX tracks subsequent replies from the customer as part of the same conversation, assuming they come within a few days. In this way, Genesys Cloud CX routes the replies to the same agent.

Organizations can configure ACD so that phone conversations can interrupt email conversations. This approach allows agents to maintain and hit service levels goals for voice while working on email during slower periods.

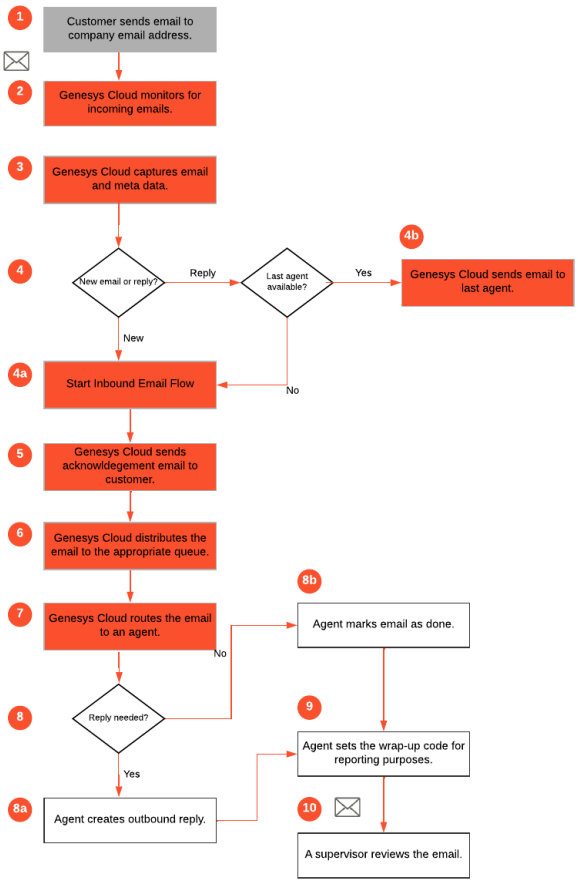
Organizations can also optionally enhance Genesys Cloud CX so that a supervisor or quality evaluator

can review outgoing emails from agents. This enhancement provides management visibility into the email interaction channel and enables further process improvements.

Use Case Definition

Business Flow

This flow describes the use case from the perspective of the main actors. For example, the customer and the contact center agent.



Business Flow Description

1. A customer sends an email to the email address in a registered domain (for example, orders@abc.org) that is configured in the Genesys Cloud CX solution.
2. Emails are delivered to Genesys Cloud CX via forwarding to a predefined email address, or via direct DNS routing with configured MX records.
3. Genesys Cloud CX captures the new email and identifies “From,” “To,” "Reply-To," “Subject,” and "Body" as meta data.
4. Genesys Cloud CX determines whether the email is a new email or a reply email.
    1. If it is a new email, the system starts a new inbound email flow.
    2. If it is a reply email from a customer, the Genesys Cloud CX attempts to route the email to the agent who previously assisted the customer, if available. If that agent is not available, Genesys Cloud CX starts the inbound email flow.
5. Optional: The system sends a receipt acknowledgement email to the customer with a predefined template for the “To” address.
6. Genesys Cloud CX determines the requested skills and transfers the conversation to a queue that can provide those skills.
7. When an agent with the requested skills is

available, Genesys Cloud CX routes the email to the appropriate agent. The agent's interface displays all relevant information about the email.

8. When the agent reads the email, the agent decides if a reply is needed.
    1. If a reply is needed, the agent creates an outbound reply email. The agent can optionally use a standard response template.
    2. If not, the agent marks the e-mail as done.
9. The agent sets a wrap-up code to mark the business outcome for reporting purposes.
10. Optional: A supervisor reviews the email.

Business and Distribution Logic

Business Logic

In the logical flows in the previous sections, there are various 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, emails are delivered to Genesys Cloud CX. The following configuration options are available:

- Direct customer-sent email messages to the yourAccountName.myGenesys Cloud CX.com domain.
- Register the business domain with Genesys Cloud CX for email routing (MX Records)
- Forward existing email addresses from corporate email platform to Genesys Cloud CX.

Note: Genesys Cloud CX does not allow an organization to use their own email platform. However, an organization could forward email from their corporate mail platform to an email address that is registered with Genesys Cloud CX. The downside of this approach is that the email responses from the agent to the customer include a different email address in the email header. However, the email address in the Reply To field is correct.

Quality Management

Email interactions are available for Quality Management just like all other media types.

Distribution Logic

1. Genesys Cloud CX checks if the email is a reply email that belongs to an existing conversation.
2. If so, Genesys Cloud CX tries to route the email to the agent who last handled the conversation. If that agent is not available, Genesys Cloud CX starts the email flow and handles the email based on the email flow configuration.

Additional Distribution Functionality

The additional distribution logic is:

- 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 queue after a timeout. The agent is set to Not Responding.
- Conversations can include emails and other media types.
- An organization can configure email interactions to be interrupted by other media types.
- An organization can set the starting priority.
- An organization can configure how Genesys Cloud CX removes skill requirements to expand the possible agent pool.

Automatic Replies

In step 5, the Genesys Cloud CX system checks for automatic/system replies from the mail server to automatically stop email processing when no agent intervention is needed. To prevent “pingpong” emails between mail servers, Genesys Cloud CX detects automated answers, such as auto-responses and auto-acknowledges. For example, it detects Out of the Office responses.

Standard Responses

The agent can use canned responses to create email responses. Each organization creates and manages their own canned responses.

Available Parameters Available for Configuration by Customer

The following configurable parameters are used for the distribution logic:

- Skill/skill level
- Overflow timeouts for skill-based routing. These timeouts are based on the age of the interaction.
- Starting priority

An organization can configure the following parameter by the "to" Email Address (for example, Sales, Jobs, or Support) or by specific keywords:

- Auto-acknowledge message
- Skill selection
- Transfer to specific queue

User Interface & Reporting

Agent UI

The following lists the minimum requirements for the agent desktop:

- Configuration of disposition codes (Cross Sell, Need Follow Up, Not Right Skill, Processed, Terminated, Transferred, Up Sell)
- Configuration of and access to standard response library
- Agent-to-Agent transfer
- Agent-to-Queue transfer
- Review functionality for supervisors

Reporting

Real-time Reporting

Use Genesys Cloud CX Performance views and dashboards for real-time reporting on email routing. Analyze email routing metrics and data to better manage and plan agent time and queue email routing.

The Agents Performance Summary View displays current and historical metrics and data about agent email interactions for the number of ACD emails routed to an agent, the total number of emails handled by an agent, emails that were transferred by an agent, and the total amount of time the agent spent handling email, for a time period. The data in this view and the Agents Performance Detail View can help with improving your routing of emails to agents.

The Queues Performance Summary View and the Queues Performance Detail View display current and past metrics and data for queues that receive email. A queue configured to receive ACD routed emails displays the number of emails routed to a queue for agents, the average amount of time an email waited in a queue before an agent answered it, the number of email interactions handled by agents in the queue, emails handled by an agent in a queue and then transferred, and the total time and average time agents spent handling emails in the queue, for a time period. The data in these views can help in improving your routing of emails to queues.

View in-progress and completed inbound email interactions in Interactions View. This view displays metrics and data for email interactions, including the language of the email, matching skills for the agent in the queue, and the number of emails sent by an agent including Reply All and Forward. Understanding this data can create a better customer experience with improved routing of emails.

Search for the media type emails in the Skills Performance View to see statistics based on the skills and languages for interactions as they enter a queue. These statistics can help supervisors determine performance issues with a specific skill in one or multiple queues. The statistics can also help supervisors evaluate the effectiveness of their evaluation and routing methods.

Historical Reporting

Run the Interactions Details Report for insights into email interactions. This report includes details on how long the email remained in a queue, the agent who handled the email, and the total duration to

handle and wrap up the email interaction. Use this report to identify if email handle time is taking longer than average, to improve managing and planning for agent and queue email routing.

View the Queue Wrap-up Summary Report to see the wrap-up codes that agents, grouped by queues, used most frequently. This helps to identify the email interactions on which agents spent most of their time. Analyzing the total number of emails and their duration, by queue, assists you in balancing the volume of email interactions, improving email routing. Better routing provides quicker responses to customer emails for faster resolution.

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

Customer Responsibilities

An organization must configure the following things for Genesys Cloud CX to receive emails:

- Use method to direct customer-sent email messages to the yourAccountName.myGenesys Cloud CX.com domain.
- Register the business domain with Genesys Cloud CX for email routing (MX Records).
- Forward existing email addresses from corporate email platform to Genesys Cloud CX.

An organization must do the following things in order for Genesys Cloud CX to access requested emails:

- Provide the subdomain
- Configure MX records appropriately

Other assumptions include:

- Genesys Cloud CX's email environment uses AWS spam verdict to detect spam. An organization has no control over the Genesys Cloud CX spam settings.
- Text input must be available in UTF-8.
- Architect provides basic text screening which allows a business to identify the presence of particular

strings in the subject, body, or both.

Related Documentation

Document Version

- Version **V 1.1.1** last updated **June 30, 2026**

Genesys Chat Routing (CE18) for Genesys Cloud

> **Important**
> Please be advised that Genesys Cloud Chat Routing and Web Chat will be deprecated in the coming years. We encourage all customers to begin using Genesys Messaging (CE34) for Genesys Cloud and the web messaging channel.

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.

Link to video

Other offerings:

-
-

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
- 7 Related Documentation
  - 7.1 Document Version

Use Case Overview

Story and Business Context

The web chat channel is an invaluable tool for communicating 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 improves 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	Agents can handle multiple chat sessions simultaneously and blend chat with other channels to increase their occupancy.
Improved First Contact Resolution	Improved First Contact Resolution by routing interactions to an expert through skills based routing
Increased Revenue	Timely and convenient access to chat helps customers complete orders, reducing abandoned transactions and increasing revenue.
Reduced Handle Time	Routing chats to the right skilled agents through skills-based routing reduces handle time.

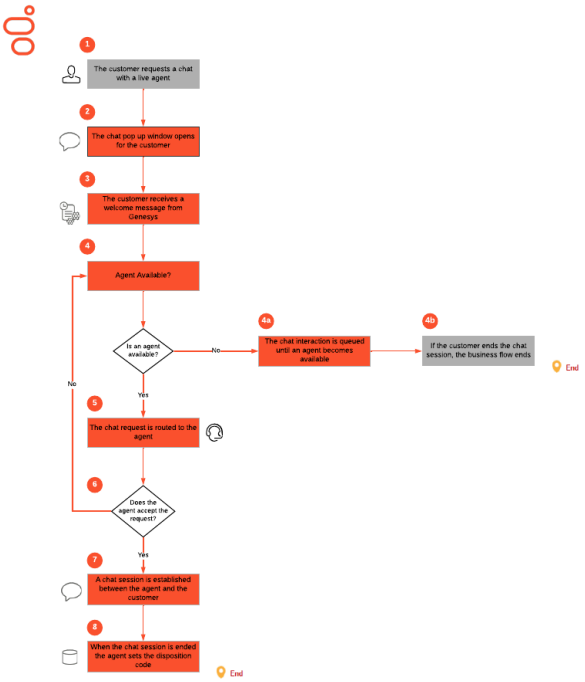
Summary

The customer 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 is provided with the customer context (requested subject).

Use Case Definition

Business Flow

This flow describes the use case from the perspective of the main actors. For example, the customer and the contact center agent. The diagram shows the business flow of the use case:



Business Flow Description

1. The customer requests to chat with a live agent via the webpage.
2. The chat pop-up window opens for the customer.
3. Based on chat configuration, the customer receives a welcome message from Genesys.
4. Genesys searches for an available chat agent.
   - If no agent is available, the chat interaction is queued until an agent becomes available.
   - If the customer ends the chat session, the business flow ends.
5. When an agent becomes available, the chat request is routed to an agent.
6. The agent either accepts or ignores the chat interaction. If the agent does not accept the chat interaction, after a specified timeout Genesys attempts to route it to another agent (Step 4) and sets the first agent to Not Responding.
7. If the agent accepts the chat interaction, the chat session between the agent and the customer is established. The agent can use standard responses based on libraries that are available to them for the chat interaction with the customer.
8. When the chat session ends, the agent can set a disposition, or wrap-up, code to register the outcome of the chat for reporting purposes.

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 chat widget includes several settings. For more information on each option, see Web chat in the Genesys

Cloud CX Developer Center.

Standard responses

In the response library window, the UI displays responses to the agent. The agent can search for responses using keywords. 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 appear to a customer outside business hours.

Additional Functionality

The following lists additional functionality for the distribution logic:

- At every step, the distribution logic looks for agents with a) the requested skill and b) a skill level within the boundaries of maximum and minimum required skill levels.
- Reroute on no answer functionality: If an agent does not accept the chat interaction, after a timeout the chat interaction automatically returns to ACD. The agent is set to Not Responding
- Blending with other media types is possible. Priority settings for chat interactions are configurable to enable proper priority ranges between different interactions and media types. Utilization rules are configured at the system level to define which interactions, if any, can be handled in parallel.

User Interface & Reporting

Agent UI

There is no applicable content for this section.

Reporting

Real-time Reporting

Genesys Cloud CX standard Analytics Views and Reports can report on "Chat." The following views are available for Web Chat:

- Interactions --> Detailed view of what happened to a conversation
- Queue Activity --> Real-time view of activity that is currently happening in queue
- Queue Performance --> Historical Performance Data based on Queue and other key data elements (skill, language, etc.)
- Agent Performance --> Historical Agent Performance data
- Skill Performance --> Historical Skills Performance data

These views can also show data specific by "Chat." Besides the various available views, Genesys Cloud CX also comes with a set of canned responses.

Historical Reporting

See Real Time 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

General Assumptions

- Genesys customers handle the integration of the solution into their website.
- Customers are responsible for creating their own automated responses within Admin.

Related Documentation

Document Version

- Version **V 1.0.2** last updated **June 30, 2026**

Genesys Co-browse (CE27) for Genesys Cloud

Extend web messaging, voice or chat interactions with Co-browse

What's the challenge?

Your customer is frustrated because they're having trouble on your website. Your agent is frustrated because he can't see where the customer is struggling. The customer has to describe what's on the screen; the agent has to articulate where to click. It's cumbersome — and results in long handle times.

What's the solution?

Improve first contact resolution by letting agents "show and tell" with your customers through a co-browsing session, using real-time annotations, comments, or even the ability to take control of the customer's screen. There's zero footprint for customer ease and content masking for peace of mind.

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 Reporting
- 6 Customer-facing Considerations
  - 6.1 Interdependencies
  - 6.2 Document Version

Use Case Overview

Story and Business Context

A customer and a contact center agent are having a conversation over the phone or through a web messaging or web chat session. During the conversation, the ability to see and control the customer's browser through co-browsing functionality enables the agent to convey information more effectively and get the customer's issue 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:

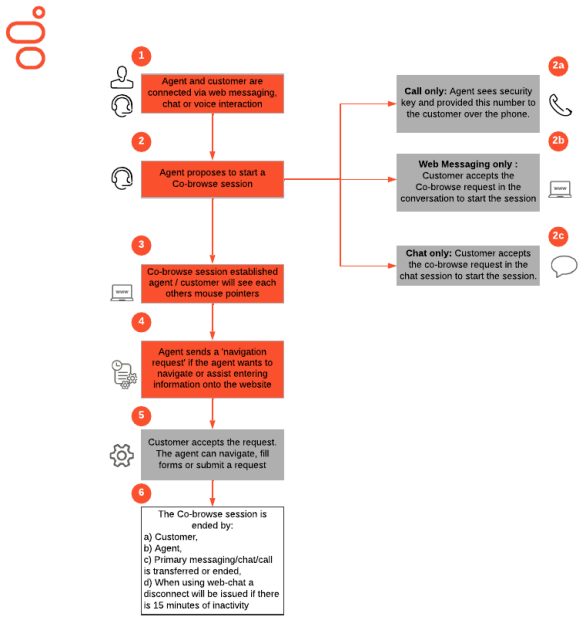
Use Case Benefits	Explanation
Improved Customer Experience	Mitigate customer frustration by providing a better method to serve and assist customers thereby reducing customer effort
Improved First Contact Resolution	Optimize the customer service experience by initiating a co-browse session with the customer to resolve their request the first time
Increased Revenue	Reduce shopping cart abandonment and increase online conversion rates.
Reduced Handle Time	Leverage annotations, comments and browser control to aid quick resolution.

Summary

During a call or a web messaging or a chat session between a customer and an agent, the customer can initiate a co-browse session with the agent, so both the agent and the customer share the same instance of the browser. This session enables the agent to provide direct support to a customer trying to complete a request on the company's website.

Use Case Definition

Business Flow



Business Flow Description

1. The customer and agent are connected via a web messaging session, a chat session or a voice call.
2. The agent may propose to the customer to start a Co-browse session to support him/her on the website. For security reasons, the customer and agent have to initiate the Co-browse session.
   - **Call only**: A security ID is displayed to the agent if he/she clicks the 'screen sharing link' in the Genesys Cloud CX UI. This security key is then given over the phone by the agent to the customer and entered by the customer. The customer enters the security key into the website to start the co-browse session.
   - **Web messaging only:** The customer clicks the "Accept" option when asked the question if they want to share their screen.
   - **Chat only**: The customer clicks the 'start sharing' option when asked the question if they want to share their screen.
3. When the session is established, the Genesys Cloud CX UI displays a view of the website in the browser window the customer is using. Agents start Co-browse sessions in read-only mode. In read-only mode, the customer and the agent can see each other's mouse pointer but the agent cannot enter any information into the web page, click buttons, or navigate the customer's browser. The agent does have the ability to highlight sections of the page (by clicking) or to add annotations to the page to guide the customer.
4. If the agent needs to enter information into the web page or to navigate the browser, he/she can send the customer a 'request navigation'.

5. Once the customer accepts this request, the agent can navigate, fill forms, and click hyperlinks on the web page. Sensitive Data can be masked before presenting to the agent, and agent controls (the ability to fill certain fields or submit forms) can be blocked through instrumentation. The customer can revoke the Write Mode at any time, returning the agent to read-only mode.
6. The Co-browse session ends when any of the following events occurs:
    - The customer chooses to end the Co-browse session
    - The agent chooses to end the Co-browse session
    - The primary web messaging, chat or voice interaction is transferred or ended by either the customer or the agent
    - For a web messaging session, after 2 minutes of inactivity the Co-browse session will be disconnected.
    - For a WebChat session after 15 minutes of inactivity the session will be disconnected. There is no timeout when using voice.

The primary voice, web messaging or chat interaction can continue even when Co-browse has ended.

Business and Distribution Logic

Business Logic

User Interface & Reporting

Reporting

Real-time Reporting

No real-time co-browse data is available currently, this data will be added in a future release.

Historical Reporting

- Interactions Detail View: Co-Browse sessions are shown in the Interactions Timeline information.
- Interaction History for External Contacts: Co-browse sessions are shown in the interaction history screen for related conversations.
- Additional co-browse metrics are available via the Genesys Cloud CX API's, not all of this data is currently exposed in the various performance views.

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** • Genesys Chat Routing (CE18) • Genesys Messaging (CE34) **Inbound** • Genesys Personalized Routing with Callback (CE43)	None	None

General Assumptions

Co-browse with Web Messaging and Voice:

- Customer has Genesys Cloud CX 2 licensing for their organization, or users who are using the Digital Add-on.
- Customer has prepared their website to work with co-browse (https://help.mypurecloud.com/articles/

set-co-browse-for-web-chat/)

- Customer has added masking to private data on their website to control what can and cannot be seen by the agent.

Co-browse with Chat:

- Customer has Genesys Cloud CX 3 licensing for their organization.
- Customer has prepared their website to work with co-browse (https://help.mypurecloud.com/articles/set-co-browse/)
- Customer has added tags to private data on their website to control what can and cannot be seen by the agent.

NOTE: Legacy Co-browse (used for Chat and previously Voice) is due to be deprecated on January 27, 2025. All customers should be directed towards the new Co-browse for Messenger, supporting Web Messaging and Voice use cases. For more information, see: https://help.mypurecloud.com/articles/deprecation-legacy-co-browse-and-screen-share/

Customer Responsibilities

- Customer is responsible for integration of the solution into the company website.
- Customer is responsible for tagging information and fields on their website that need to be hidden from the agent during a co-browse session, or agent controls that need to be blocked (such as Submit form).

Document Version

- Version **V 1.1.3** last updated **June 30, 2026**

Genesys SMS Routing (CE29) for Genesys Cloud

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.

Link to video

Other offerings:

-
-

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
- 7 Related Documentation
  - 7.1 Document Version

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. More often, customers choose asynchronous channels, such as SMS, for the convenience it provides. Using SMS, customers can avoid calling and waiting on hold for an available agent. SMS also allows customers to engage "on the go" without a dedicated mobile app. Also, because customers engage by SMS at faster rates than any other messaging channel, the organization can resolve issues 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	Routing of SMS messages to the right skilled agents through skills-based routing. Defer work to a later time when traffic volumes are not as significant.
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

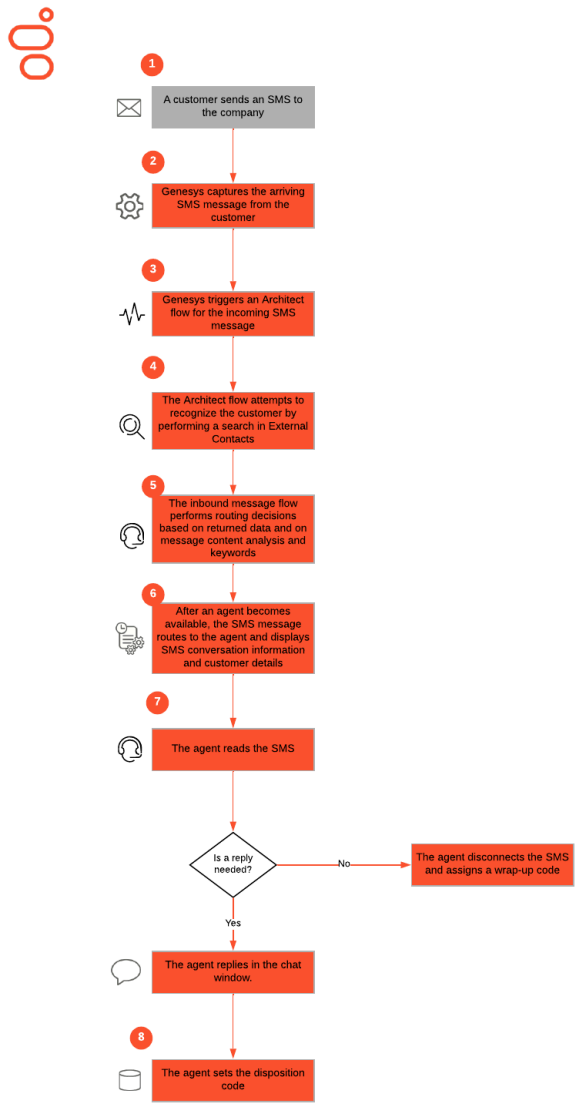
A customer sends an SMS message to a company. The Genesys system receives the SMS message and routes it to the appropriate messaging flow for processing. The messaging flow allows customer to potentially perform a data dip that enriches the available data about the SMS conversation. Based on decisions made in the flow, the system eventually transfers that data to a queue. The system then queues the SMS message to the best available agent who has the skills that correspond with the skills requested in the flow. When an agent becomes available, the system routes the conversation to the agent by ACD, just like any other media type. The agent answers the message, reviews the message contents, and replies from within the Genesys Cloud CX interface. The agent can keep the message open and use SMS like a chat channel, or close the SMS message after replying. If the agent keeps the conversation open, the system immediately displays each customer response to the agent, using SMS messages as a chat channel. If the agent closes the conversation but the customer replies within 72 hours, the conversation reopens (after 72 hours, the system creates a new conversation) and routes to the last agent that handled the SMS. If that agent is unavailable, the system routes the message by ACD to the next available agent. After the conversation ends, it may pass to a Quality Evaluator, who scores the conversation. As part of the SMS messaging channels, supervisors can

view SMS traffic in all the analytics dynamic views.

Use Case Definition

Business Flow

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



Business Flow Description

1. A customer sends an SMS to a company long code, toll-free number, or short code. Reference Resource Center for more information regarding SMS and supported countries.
2. Genesys Cloud CX receives the SMS message, including the customer's phone number as metadata.
3. Genesys triggers an Architect inbound message flow for the incoming SMS message.
4. The Architect flow attempts to recognize the customer by performing a search in External Contacts or external data source (optional).
5. The inbound message flow performs routing decisions based on the data returned from External Contacts (or External Data source as an option) and also based on message content analysis and keywords
6. When an agent within the queue is available, the SMS message routes to the agent. A screen pop displays related SMS information. Relevant conversation information appears in the agent script. The agent receives full context of the SMS conversation.
7. The agent reads the SMS message and determines if a reply is necessary.
    1. If reply is not necessary, the agent disconnects the SMS and assigns a wrap-up code that indicates a response is not necessary.

2. If a reply is necessary, the agent replies in the chat window, potentially using a standard response template.
3. If they expect the customer to respond quickly, the agent can leave the conversation open. If not, they can close the conversation.

8. When the conversation closes, the agent sets a disposition code to mark the business outcome for reporting purposes after the interaction disconnects.

Business and Distribution Logic

Business Logic

There is no applicable content for this section.

Distribution Logic

There is no applicable content for this section.

User Interface & Reporting

Agent UI

- Standard Genesys Cloud CX user interface.
- Access to response library.
- Admin and Architect access to provision and configure SMS numbers and flows.

Reporting

Real-time Reporting

Genesys Cloud CX comes with a set of real-time dashboards, views, and reports. These views and reports work across all channels including messaging, which also shows all SMS messages. This feature enables supervisors to gain insight on the SMS traffic that the system handles. The following list outlines some of the key views available to exposed analytics data:

- Interactions: A detailed view that provides information related to each conversation and shows every step along the way for an SMS message.
- Queue Activity: Real-time view of the conversations waiting in queue.
- Queue Performance: Queue Metrics specific to SMS volume, including the ability to get insight into SL, Handle Time, ACW, and other key metrics specific to SMS.

- Agent Performance: Specific metrics around agents, including Handle Time, number of SMS conversations, and more.
- Wrap-Up Performance: Detailed insight into selected wrap-up codes.
- Skills Performance: Detailed insight and metrics specific to skills-based routing.
- Several Canned Reports: Set of canned reports specific to the various needs from contact centers and specific to messaging.

Genesys Cloud CX continuously releases new capabilities. For additional information and details on newly released analytics features, see the release notes on the Resource Center at help.mypurecloud.com.

Historical Reporting

See Above.

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

Each Genesys DC must purchase an SMS server to serve as the reverse proxy server for cloud customers.

Customer Responsibilities

- Customer secures and provisions a dedicated long code or text-enabled toll-free number, enabling them to send SMS messages in Genesys Cloud CX.

Related Documentation

Document Version

- Version **V 1.0.0** last updated **June 30, 2026**

Genesys Chatbots (CE31) for Genesys Cloud

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 callback[1] during or after hours.

[1]*Callback option is available for Genesys Engage only.*

Link to video

Other offerings:

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
  - 6.2 Document Version

Use Case Overview

Story and Business Context

The proliferation of digital channels leads to higher customer expectations and an increased number of interactions that companies deal with when servicing customers. Coupled with increased usage of Artificial Intelligence (AI) for business applications, this change results in organizations implementing chatbots that can interact with customers to automate tasks and assist their queries on digital 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 can hand over to a live agent at any time where 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.

Genesys chatbots unify and orchestrates self-service experiences using both native and third-party bots – powering exceptional customer and employee experiences. 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 focuses on deploying a bot on web chat, mobile chat, Facebook Messenger, Twitter Direct Message, Line Messaging, WhatsApp, or SMS.

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 contacts, offer immediate options, and improve outcomes.
Improved First Contact Resolution	Tailor the customer experience to the individual based on who they are, why they could be interacting, and the status of the contact center

Summary

Genesys Chatbots supports native platform Dialog Engine Bot Flows and third-party platforms such as Amazon, Google etc. As each chatbot and third party has their own specific capabilities, this use case covers broadly available capabilities, for the most of to date latest references available, visit the Resource Center.

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
- Simple bot orchestration enables customers to use the best bot for the job. For example Google Dialogflow has highest alphanumeric recognition rates
- Genesys Cloud CX Architect makes it easy to integrate to new bot providers, switch between bot providers or to use multiple bot providers within a single interaction
- A-B testing with Genesys Cloud CX Architect helps determine which bot is most effective for a particular business use case
- Graceful escalation to a live Agent at the right time

Use Case Definition

Business Flow

When a customer interacts through a supported Genesys digital channel, a chatbot starts. The chatbot first attempts to use context to anticipate why the customer may be engaging and in turn provides personalized messages 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 what to do next. For example, if the customer replies with “I want to check my balance,” the chatbot would first identify and verify them before showing their balance.

Once the task finishes, the chatbot asks if the customer needs more 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 intent is not established or understood, the chatbot passes the customer to an advisor.

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

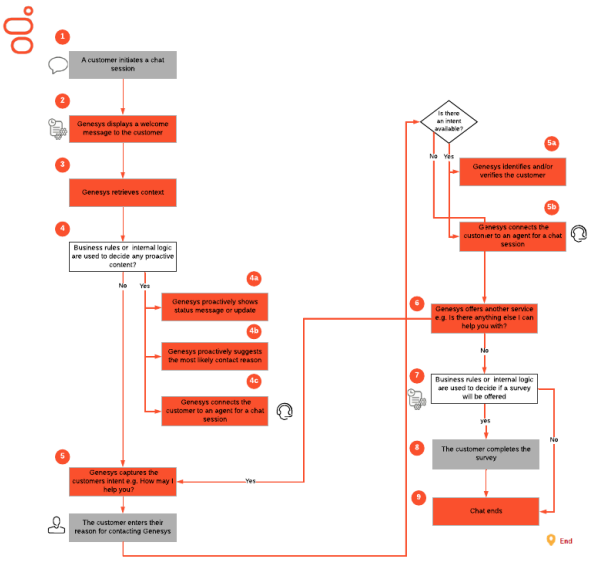
The chatbot continues in this fashion, creating a conversational loop and building context between itself and the customer to better solve their query.

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

Business and Distribution Logic

Business Logic

NLU:



- Intents: The goal of the interaction. For example, a

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:
   - Customer profile information in External Contacts
   - API call to third-party data source
4. The customer receives a personalized message or is handed over to an agent. Examples include:
   - Custom message or update: "Your next order is due to arrive on Thursday before 12."
   - Customer is handed over directly to an agent because they owe an outstanding balance.
   - 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 interaction is sent to a chatbot (for example Genesys Dialog Engine) which asks an open-ended question like: “How may I help you?” to determine intent and capture the customer's response.**[BL1]**
   - If intent and slots are returned, the conversation moves to the correct point in the interaction flow, for example;
     - Automated notification task (such as display balance)
     - Handoff to live agent
   - If intent and slots are not returned, the conversation returns to the interaction flow and the customer is handed off to an agent.
6. Upon completion of a task,the interaction is sent to a chatbot (for example Genesys Dialog Engine) which asks a follow-up question like: "Is there anything else I can

"switch flight" intent returned by the NLU indicates that the customer receives a payment business process.

- Slots: Additional pieces of key information returned by the NLU. These pieces can accelerate the conversation by prepopulating answers to subsequent questions.

BL1: Agent Handoff: The customer can ask to connect to an available agent. At that point, the chatbot disconnects and the chat transcript (excluding sensitive data) appears in the agent desktop.

BL2: Survey: The customer can determine whether to address a survey or not. This survey can be based on:

- Customer profile information in External Contacts
- Customer journey data
- API call to third-party data source

Distribution Logic

There is no applicable content for this section.

User Interface & Reporting

Agent UI

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

Reporting

Real-time Reporting

With Genesys Cloud CX, you can do flow reporting and use flow outcomes to report on chatbot intents.

See the Flows Performance Summary view and use flow outcomes statistics to help you determine performance issues for specific chatbot flows, and gather data about self-service success. Use the chatbot flow data to improve outcomes.

Use the Flows Performance Detail view to see a breakdown of metrics by interval for a specific chatbot flow, and to see how chatbot interactions enter and leave a chat flow.

The Flow Outcomes Summary view displays statistics related to chats that enter Architect flows. These statistics can help you determine how well your chatbot flows serve customers and gather

help you with?"

- If the customer responds “yes,” they return to Step 5: "How may I help you?”
- If the customer responds “no,” then the conversation returns to the interaction flow
- If the customer responds with a more advanced answer, then determine intent and entities for further processing.

7. Customer information and/or context is retrieved to determine whether to offer a survey.**[BL2]**
   - If a survey is offered, the interactions is sent to a chatbot.
   - If no survey is offered, the interaction flow shows a goodbye message and ends
8. The survey is executed. The survey questions are configurable by the customer on a business-as-usual basis in the chatbot and therefore no dialog flow is defined here.
9. The interaction flow presents a goodbye message and ends the chat

data about self-service success.

Historical Reporting

We are working on providing more chatbot reporting in the future, including building your own chatbot 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	**Digital** • Genesys Chat Routing (CE18) • Genesys SMS Routing (CE29) • Genesys Messaging (CE34)	None	None

General Assumptions

- Handoff to agent is on the same channel.
- The customer is responsible for the build of the natural language bot model and providing the bot training of utterances, intents, or slots. Professional Service may be engaged to develop the model.
- Survey capabilities are provided by chatbot provider QA functionality (for example, Amazon Lex) and need customization.
- Chatbot integration is not HIPAA-compliant.
- Third-Party Chatbots are enabled via the Integrations Registry and informational through AppFoundry.
- Customers use their own third-party Chatbot accounts for Integration Services.

Document Version

- Version **1.4.0** last updated **June 30, 2026**

Genesys Messaging (CE34) for Genesys Cloud

Offer a powerful new way for customers to connect with you directly in Messages

What's the challenge?

To engage customers on their devices, enable seamless experiences, build brands and reduce service and support costs using mobile messaging channels. Pain points include increased customer frustration due to failure of carrying context across channels and rising costs due to increased calls to agents.

What's the solution?

Using Genesys Messaging to support continuous, personalized conversations with integrated agent assistance and persistent history of contact, bringing new levels of scalability, consistency, and responsiveness to messaging interaction strategies

Link to video

Other offerings:

-

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
- 7 Related Documentation
    - 7.1 Document Version

Use Case Overview

Story and Business Context

In today's digital world, telephone calls are not always the best or desired way to communicate with businesses. Telephone calls are not visual, and they require synchronous live interaction. Consumers want a simple, convenient method of communication through the channel of their choice and according to their own schedule. They want to use channels they are familiar with and that they use in their everyday lives. Third-party messaging applications are a popular communication option that consumers have come to expect as a way to interact with companies.

Genesys messaging enables two-way conversations between consumers and businesses on familiar digital channels and across mobile devices. Genesys messaging provides a feature-rich, flexible, and convenient method of answering questions and solving problems all through a single messaging conversation. The long-lived, asynchronous nature of the conversation means that consumers and contact center agents can return to the conversation at any time with a full history.

This use case enables businesses to handle messaging conversations with channels like Genesys Cloud Web Messaging, Facebook Messenger, Instagram, X (Twitter) Direct Message, and WhatsApp in their Genesys contact center environment. Additional messaging channels can be integrated with Genesys Cloud through the Open Messaging API.

To increase successful self-service interactions, a bot used over these messaging channels can automate the conversation with the customer. A bot can transfer the interaction to a contact center agent seamlessly if needed. When companies enable supported Genesys Messaging customer service channels within their Genesys environment, benefits can include:

- Improved first contact resolution and reduced handle time by matching every consumer with the agent best equipped to respond through skills-based routing
- Improved NPS by carrying context across channels and matching the consumer with an appropriately skilled agent, similar to how all Genesys channels are managed
- Reduced costs by granting agents the ability to manage multiple messaging conversations simultaneously and blend messaging conversations with other media types in the same agent desktop
- Continuity in asynchronous conversations, enabling consumers to make contact when convenient throughout the day or week
- Workforce management and reporting integrated with the rest of the contact center
- Improved brand perception by offering channels that end customers want to use to interact with businesses
- More engaging experiences with file transfers, images, and rich media such as quick replies, cards, carousels and more.
- Convenience for consumers by offering a familiar messaging solution as opposed to a separate chat window

- Reduced cost by lowering handling time on complex issues through using co-browse functionality (available with Genesys Cloud Web Messaging)

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	Match the consumer with an appropriately skilled agent. Provide continuity in asynchronous conversations by enabling consumers to make contact when convenient throughout the day, week, or buying or service journey. Make it convenient for consumers by using familiar and convenient messaging solutions
Improved First Contact Resolution	Ensure each consumer is matched with the most suitable agent by utilizing various routing options, such as skills-based routing or AI-driven Genesys Cloud Predictive Routing.
Reduced Administration Costs	Reduce costs by granting agents the ability to manage multiple messaging conversations simultaneously and blend messaging conversations with other media types (email, SMS and voice) in the same agent desktop.

Summary

A consumer can start a conversation with a business directly in messaging platforms such as Facebook Messenger, Instagram, X (Twitter) Direct Message, and WhatsApp. Additional messaging channels can be integrated with Genesys Cloud through the Open Messaging API. To start a conversation a consumer can receive offers that include messaging apps, links, or account names and phone numbers in customer mobile apps, websites, and promotional materials. Genesys Cloud Web Messaging works similarly, with the consumer engaging the business directly through their website or mobile app where Messenger is deployed. These conversations route to a company’s contact center through the Genesys Messaging service. A bot can automate the conversation and transition to a contact center agent if needed or the conversation can route directly to a contact center agent to provide human assistance. These engagements are persistent and long-lived (asynchronous). During the conversation bots can present rich media elements to enrich the conversation and gather information and preferences. The conversation can be further enriched with images, files, URL links, emojis, and embeds such as video content. This feature makes it convenient for the consumer to resolve an issue, receive an answer to a question, or complete a transaction (such capabilities vary by channel).

Use Case Definition

Business Flow

Messaging Flow

Business and Distribution Logic

Business Logic

End users can receive brand-initiated messages if they have opted in

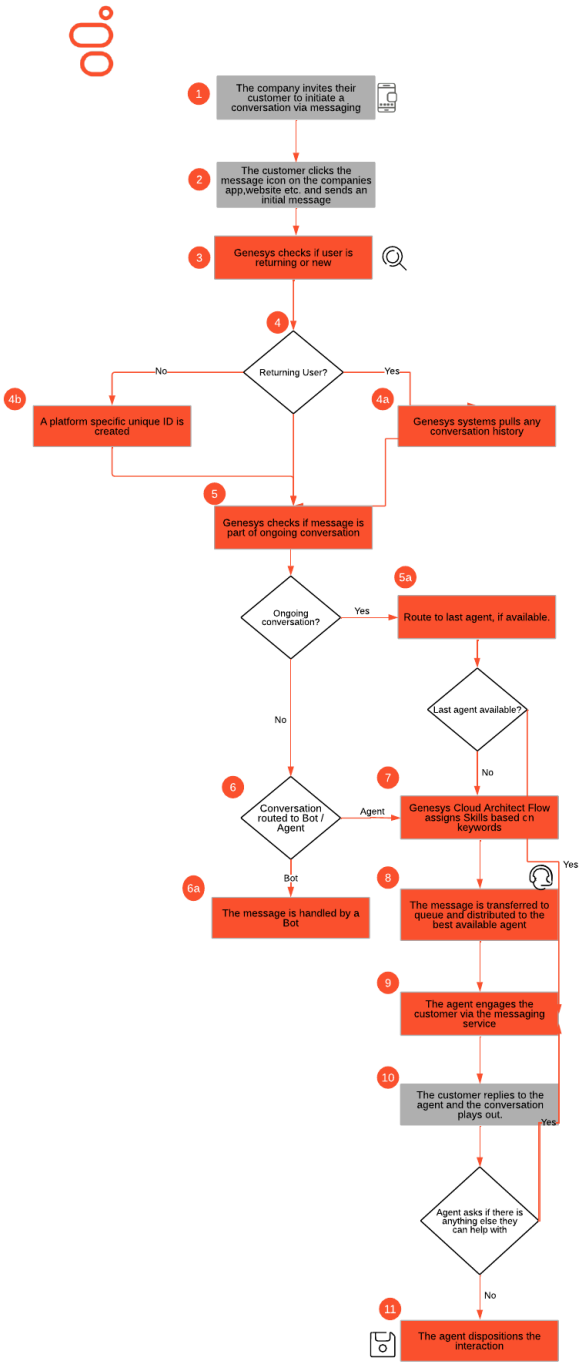
- **Genesys Cloud Web Messaging**
  - Conversations will be threaded until a maximum period of 72 hours of inactivity is reached. If an agent wraps up an interaction and there is no further activity within the 72-hour period, the conversation session will be terminated and the consumer will see a brand-new session when they revisit the Messenger. This 72-hour threading window can be configured to be less than 72 hours if desired, however the customer's view of the conversation in Messenger will always be based on the 72 hours of inactivity.

- **Open Messaging APIs**
  - Open Messaging is a lightweight integration that enables communication with third-party systems and external messaging services, greatly expanding the amount of asynchronous channels you can cover beyond those natively supported by Genesys. Through using Open Messaging, you can harness Genesys Cloud's asynchronous ACD capabilities to route incoming messages to the appropriate queues and agents. Asynchronous messaging keeps conversations active, allowing customers to continue at their own pace. Furthermore, you can utilize Inbound Message flows in Architect to direct inbound messages to integrations, bots, and queues based on the content of the message.

Distribution Logic

With each conversation:

- For new interactions:
  - Genesys Cloud Web Messaging, Facebook, X (Twitter), Instagram and WhatsApp pass platform-specific unique IDs.
  - For customers who previously initiated a conversation, the system pulls the conversation history and presents it to the agent.



Business Flow Description

1. Company invites the customer to initiate a conversation via messaging e.g. via a custom Click to Action button in their app, on their website, osr in an email or promotional materials.
2. The customer clicks the message icon and sends an initial message to begin the conversation.
3. The Genesys system checks to see if it is a new or returning customer
4. (a)For customers who have initiated a conversation previously, the system pulls the conversation history and presents it to the agent.

(b) For brand new interactions, Genesys Web Messaging, Facebook, Instagram and X (Twitter), and WhatsApp pass platform-specific unique IDs

1. The Genesys system determines if the message is part of an ongoing conversation by checking if a message from the same user was received within a configured threading timeline window. Ongoing conversations will be routed to the last agent who handled the conversation, if available.
2. If the message is not part of an ongoing conversation, conversation may be routed to a Bot, and/or
3. When the last agent is not available and for new conversations, The message is processed by a Genesys Cloud CX Architect Flow.
4. The message is transferred by skills-based ACD to an Agent queue.
5. When routed to an agent, the customer and agent begin or continue a conversation. Depending on the conversation topic, the agent can send the customer messages including text, emojis, stickers, URLs, images and files.
6. Customer and agent interact via messaging service
7. After conversation is complete, the agent dispositions the interaction.

User Interface & Reporting

Agent UI

- History of the threaded conversation is displayed to the agent upon interaction arrival. Agent can scroll back through previous messages on the threaded conversation.
- If enabled the agent can view the end customers journey and interaction history via the journey panel in the UI. This provides the agent with valuable context about the journey the customer has taken and the historical interactions and channel preferences.
- Agent can send rich message elements, such as files, images, emojis or URL links depending on the platform.
- Genesys Cloud CX 2, Genesys Cloud CX 2 Digital, Genesys Cloud CX 3, Genesys Cloud CX 3 Digital or the Genesys Cloud Digital Upgrade for CX 1 is required for Genesys Cloud Web Messaging, Open Messaging, and third-party messaging channels.

Reporting

Real-time Reporting

Use Genesys Cloud Performance views and dashboards for real-time reporting on Message interactions. Filter by Media Type to view Message analytics reporting on messaging channels. Further filter on message type to see reporting for specific messaging channels.

The Interactions view displays current and historical metrics and data about Message interactions for the conversation duration of the message interactions, the queue the message interaction was routed to, the agent that handled the message interaction, the skills required for handling the message interaction, a consult transfer, the total handle time, and the wrap-up code, for a time period. The data in this view and the View an interaction’s details view can assist you in improving first contact resolution and reducing handle time.

The Agents Performance Summary view displays current and historical metrics and data about agent Message interactions for the number of messages handled, the average number of seconds an agent spent interacting on message interactions, the total amount of time an agent spent handling message interactions, the percent of message interactions transferred, for a period. The data in this view and the Agents Performance Detail view assists you in forecasting Message interactions and scheduling agents.

The Queues Performance Summary view and the Queues Performance Detail view display current and past metrics and data for queues that receive Message interactions. A queue configured to receive Message interactions displays the total number of message interactions routed to a queue, the average time a message interaction waited in a queue, the number of message interactions transferred by an agent, and the total time and average time agents spent handling message interactions in the queue, for a time period. The metrics in these views can assist you in balancing and managing agent workload for messaging channels.

View real-time reporting on Message interactions that are in progress and waiting in the My Queues

Activity view. The data in this view can help you improve workforce management for messaging.

Historical Reporting

To report on messaging channels in Genesys Cloud Reports, for the Media Type parameter, select Message. Further filter on message type to see reporting for specific messaging channels. The following is an example of running a report for Message interactions.

Run the Interaction Details report for one or more agents during a specific date and time range. The report includes the Message interactions associated with agents, the queue wait time, the duration of the message interaction, and the wrap-up code. In addition to the interaction details, this report assists you in understanding the amount of time agents are spending on Message interactions.

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

Web Messaging

- Customers create a Web Messenger configuration and deployment, then add the deployment snippet to their web pages where their consumers can interact with the business.

Mobile Messaging

- Customers can embed Genesys Mobile Messenger SDK into their native mobile apps to show a Messenger UI capable of asynchronous messaging where consumers can interact with the business, similar to the Web Messenger.

Facebook Messenger

- Customers create a Facebook Messenger Integration in Genesys Cloud to connecting their Facebook page enabled with Facebook Messenger to Genesys Cloud and enable receiving and sending of direct messages within Genesys Cloud.

Instagram

- Customers create an Instagram Integration in Genesys Cloud to connecting their Instagram Account to Genesys Cloud and enable receiving and sending of direct messages within Genesys Cloud.

X (Twitter) Direct Message

- Customers create an X Integration in Genesys Cloud to connect their X handle to Genesys Cloud and enable receiving and sending direct messages within Genesys Cloud.
- Businesses deploy an approved X (Twitter) Direct Message app.
- Customers agree to the X/Twitter Rules and Spam Policy as defined by X (Twitter).

WhatsApp

- Customers provision and own the voice or SMS number to be used for their business WhatsApp account. Customers will maintain ownership of the voice or SMS number while their WhatsApp account using that number is active.
- Customers create a WhatsApp Integration in Genesys Cloud to connect their WhatsApp number to Genesys Cloud and enable receiving and sending of direct messages within Genesys Cloud.

Open Messaging

- Customers create an Open Messaging Integration in Genesys Cloud using a Outbound Notification Webhook to connect to a custom asynchronous messaging channel to Genesys Cloud. This will enable receiving and sending of messages with Genesys Cloud.

Other Assumptions

End customers must have a supported application version installed as a mobile or desktop application, where applicable, or be logged into the Messaging channel provider's website with a supported web browser.

- Text, Files, Images, Emojis, URL links, and Rich Media are supported (support by channel varies)
- Mobile applications
- Facebook Messenger, X (Twitter), Instagram, and WhatsApp mobile clients are compatible with Genesys Messaging for Genesys Cloud CX, where required platform messaging apps have been approved, configured, and deployed according to the provider's guidelines.
- Website applications
- Facebook Messenger, Instagram, X (Twitter), and WhatsApp web clients are compatible with Genesys Messaging for Genesys Cloud CX, where required platform messaging apps have been approved, configured, and deployed according to the provider's guidelines.

Customer Responsibilities

Customers will adhere to all Terms and Conditions of the Social Messaging

platforms they choose to configure with Genesys Cloud.

Facebook Messenger

- Customers must setup up their own business Facebook page with messenger setup to integrate with Genesys Cloud.

Instagram

- Customers must bring their own Instagram Account for integration.

X (Twitter)

- Customers must signup for their own business handle with X to integrate with Genesys Cloud.

WhatsApp

- Customers are responsible for setting up their companies Meta Business Manager Account and verifying their business with Meta.
- Customers are responsible for procuring a voice/SMS number to be used by their business for WhatsApp. Customers are responsible for maintaining ownership of the voice/SMS number while their WhatsApp account is active.

Open Messaging

- Customers are responsible for building any middleware solutions needed between Genesys Cloud Open Messaging and the integrated messaging application.

Web & Mobile Messenger

- Customers are responsible for deploying either JavaScript snippet to their website, or add Mobile SDK to their mobile app, in order to run both Web and Mobile Messenger.

Related Documentation

Document Version

- Version **2.0.2** last updated **June 30, 2026**

Genesys Predictive Engagement (CE37) for Genesys Cloud

> **Important**
> This use case now includes capabilities previously documented under Genesys Predictive Engagement for Sales (SL09) and supports both Customer Service and Sales verticals.

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.

Link to video

Other offerings:

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 Flow
  - 4.3 Business and Distribution Logic
- 5 User Interface & Reporting
  - 5.1 Agent UI
  - 5.2 Reporting
- 6 Customer-facing Considerations
  - 6.1 Interdependencies
- 7 Related Documentation
  - 7.1 Document Version

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 you might overlook the intentions and reactions of individual customers and prospects. Focus is often placed on the broad strokes–key metrics like the number of conversions per month–and the ability to identify the potential customers who need engagement is lost. As a result, customers who might 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 extending 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. Genesys Predictive Engagement 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 easy to act on 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 start 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	Providing great customer experience leads to happier and more loyal customers. Website visitor experience is not disrupted with unnecessary offers of chat or interaction. The agent has the right context and information to address and serve the customer or prospect successfully, resulting in improved first contact resolution.
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. The 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.

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 leading to improvement of key performance indicators like call deflection, average order value (AOV), first contact resolution, and conversion rates.

Use Case Definition

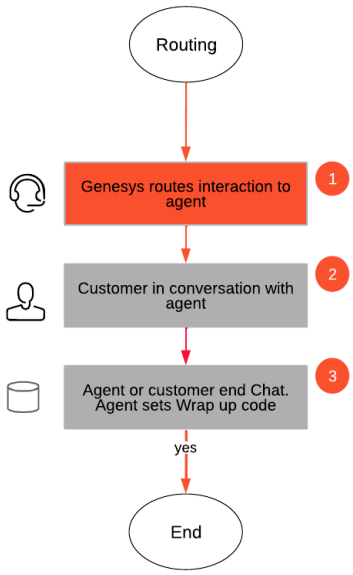
Business Flow

Main Flow

Business Flow

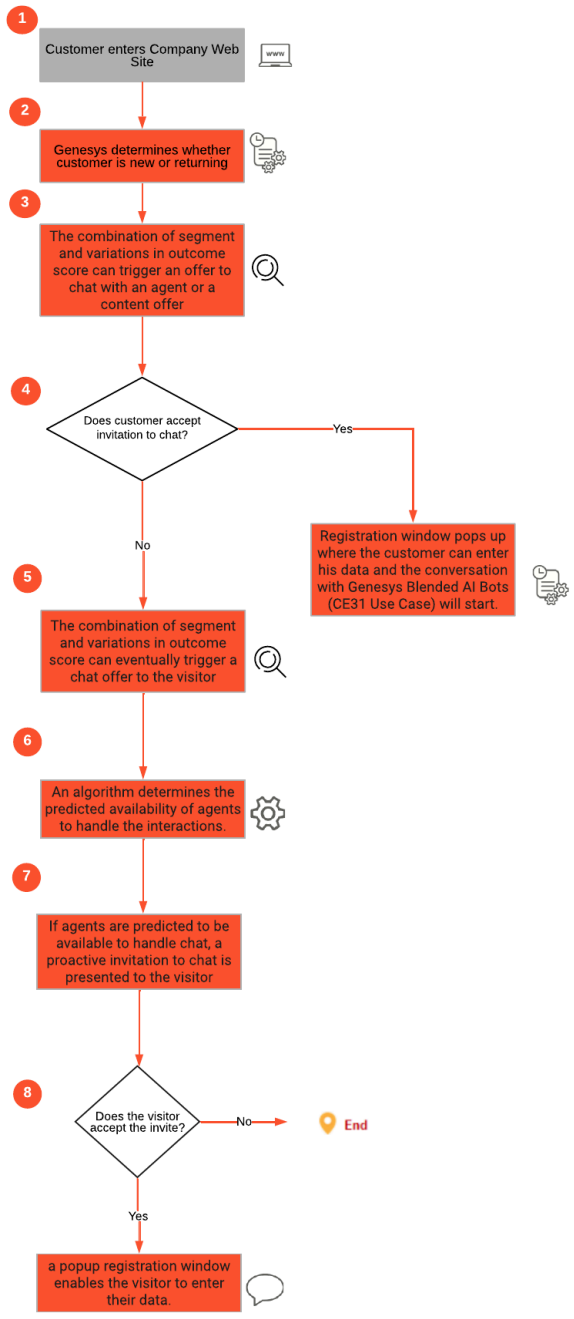
Routing

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 their data and the conversation with Genesys Blended AI Bots (CE31 Use Case) starts. In the registration form, customer can either manually enter their contact details (name, email) or contact details are 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.

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, they 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 are 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 Workspace Desktop Edition 8.5 (in case chatbot conversation requires escalation to an agent)
- Requires Interaction Connect
- 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, if a marketing campaign has gone live and drill into individual customer journeys.

Historical Reporting

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; web chat, 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

Individual Drill-down

External Contacts provides historical conversational data including chats triggered by Predictive Engagement on an individual customer level.

Analytics

Performance reporting is available on Genesys Cloud CX, it gives an in-depth look at individual queue and agent performance. There are three different types of reports: canned reports, customized reports, and raw data API feeds.

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 • Genesys Chat Routing (CE18)	None	None	None

All of the following required:	At least one of the following required:	Optional	Exceptions
Self-Service and Automation • Genesys Chatbots (CE31)			

General Assumptions

- Genesys Widgets 9 must be used.
- General logic for routing of interactions is defined with logic within the mandatory use cases.
- Design and configuration of this use should account for previous deployment of mandatory use cases.
- Genesys Widgets must be used. Customer must deploy both Genesys Predictive Engagement and Widgets code snippets on their website / webpages.
- General logic for routing of interactions uses part of these cases. If CE18 is already deployed and customized, SL09 design and configuration must be accounted for.
- Genesys Interaction Connect release 2019R1 is required.
- Integration of Genesys Predictive Engagement desktop gadgets into Workspace Web Edition 9
- Based on Genesys Widgets 9 with standard capabilities to adapt to customer corporate identity.
- Predictive Engagement can automatically create leads in Salesforce and any CRM that uses Rest APIs through Action Map orchestration.
- Profiles can be looked up on the CRM and the lead information displayed within the Script tab of the Agent Workspace. Agents can also manually create and update lead information here without the need to directly log in to the CRM.

Customer Responsibilities

- Customer must deploy both Genesys Predictive Engagement and Widgets code snippets on their website / webpages.

Related Documentation

Document Version

- Version **V 1.1.1** last updated **June 30, 2026**

Genesys Voicebots (CE41) for Genesys Cloud

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.

Link to video

Other offerings:

-
-

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
- 7 Related Documentation
  - 7.1 Document Version

Use Case Overview

Story and Business Context

Natural Language Understanding (NLU) allows customers to speak in their natural language without having to repeat specific keywords that may or may not align with the customer's intent. With the evolving functionality of artificial intelligence tools such as Alexa, Siri, and the like, customer begin to see these types of interactions as the norm. Contact centers are a natural progression into this world of virtual assistants.

When a customer can speak naturally, the company can better understand the intent of a customer and then more quickly route the call to a highly skilled agent. Voicebot integration within Genesys Cloud CX enables customers to utilize NLU within inbound synchronous customer interaction flows.

Voicebots can alleviate strain on contact center employees while improving the customer experience and controlling costs. Voicebots are always on and available, and can be handed over to an agent at any time needed. While Voicebots 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 bots 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 contacts, offer immediate options, and improve outcomes.
Improved First Contact Resolution	Use NLU to improve the identification of customer intent to serve the customer best. Tailor the customer experience to the individual based on who they are, why they could 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 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 voice.

During a call, the customer uses NLU to either easily get to an appropriate agent or obtain the information and assistance they need without engaging an agent.

The voicebot supports or orchestrates the following capabilities:

- Use NLU to derive intents and slots.
- Stream the customer response to the voicebot for processing. The voicebot recognizes the intent, understands its meaning, and captures key information into slots. These slots are then passed back to Dialog Engine Bot Flows for further processing.
- Delegate to an agent to connect the customer to a live person with the full context of the interaction.

Genesys bot orchestration enables customers to use a bot of their choice for the job. For example, Google Dialogflow has the highest alphanumeric recognition rates. Also:

- Genesys Cloud CX Architect makes it easy to integrate to Third party bot providers, switching between bot providers or using multiple bot providers within a single interaction.
- A-B testing with Genesys Cloud CX Architect helps determine which bot is most effective for a particular business use case.
- Graceful escalation to a live agent at the right time.

Use Case Definition

Business Flow

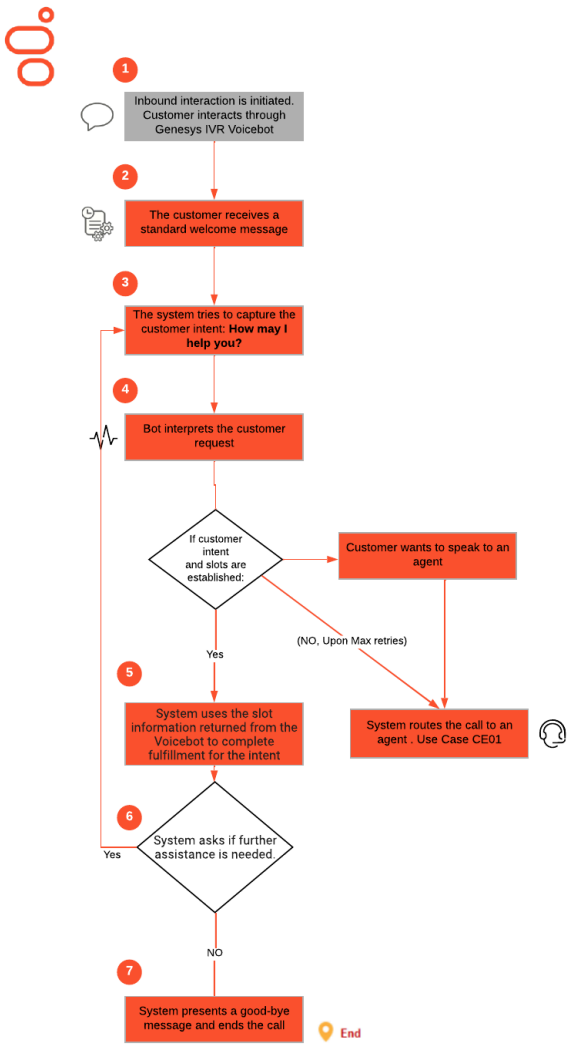
When a customer calls Genesys Cloud CX, a Voicebot can be initiated. The system asks the customer an open question, such as "How may I help?".

After the customer responds, the Voicebot attempts to interpret the intent of the request and then decides the next step. For example, if the customer replies, "I want to check the status of my flight," then the Voicebot prompts the user for a flight number to fill the required slot for the intent. Once, the intent is detected and all the slots are filled the call returns to the Genesys IVR for fulfillment. For example, a back-end web-service call on the flight number can be used to return the flight status which is then played back to the caller.

If the Voicebot cannot establish or understand the customer's intent, the system routes the call to an agent.

After the Voicebot task ends, the Genesys IVR asks if the customer needs any additional help. The customer can ask another question, request to speak to an adviser, or indicate that no further assistance is needed. If the customer needs no further assistance, the call ends.

If the customer chooses to speak or chat with an agent but faces a long wait-time to reach an agent, or the request.



Business Flow Description

1. An inbound call interaction starts.
2. The customer receives a standard welcome message from the system.
3. The system asks an open-ended question. For example “How may I help you?” to determine intent and capture the customer's response. One intent is always "I want to speak to an agent." (BL1)
4. The customer response routes to the voicebot. The voicebot converses with the customer to determine intent. The voicebot prompts the customer, as needed, to determine intent and collect all required slots. If intent is recognized and slots are returned, the conversation moves to the correct point in the flow. Otherwise, after a configured number of retries, return a failure message. (BL2, BL1, BL3)
5. If the flow steers to fulfillment for the intent, then the system uses the slot information returned from the voicebot to complete fulfillment for the intent.
6. After the task ends, the system asks if the customer needs further assistance. The voicebot can be called on again. The greeting for the second and subsequent invocations can be customized.
7. If the customer replies that they require no further assistance, the system presents a good-bye message and ends the call.

Business and Distribution Logic

Business Logic

BL1: Agent Handoff: The customer asks to connect to an available agent. At that point, the voicebot disconnects and the customer context data appears in the agent desktop.

BL2: Retries: In the voicebot management interface, configure the number of retries for self-service tasks and questions. Configure the dialog to, upon maximum retries, present a

message, or hand-off to an agent. Or through IVR configuration, offer a callback if the agent is busy or the request is outside business hours through IVR configuration.

BL3: Response Type: Configure the interaction flows to accept natural language responses and closed responses such as account number, date of birth, and yes or no questions. This process means that customers can backtrack to a different point in the dialogue when required. For example, if a customer is midway through getting flight information and says, “actually just tell me where your nearest ticket counter is,” then voicebot informs the customer of the location of the nearest counter.

Parameters influencing voicebot behavior

This use case is supported across industry verticals. The basic features of voicebot business logic, such as personalization, are parameterized. Example parameters include:

NLU

- Intents: The goal of the interaction. For example, a "switch flight" intent returned by the NLU indicates that the customer should receive a payment business process.
- Slots. More pieces of key information returned by the NLU. These pieces can accelerate the conversation by prepopulating answers to subsequent questions.

Agent Handoff

- Based on user choice, such as "I want to speak to an adviser."
- Based on default handling, such as retries, timeouts, and global commands.
- Based on application logic, such as the customer owes money and application decides to transfer.

Distribution Logic

There are three possible ways for the flow to end with a transfer to ACD after a voicebot:

1. The caller requests live Agent assistance.
2. The voicebot failure path steered the call to ACD.
3. The path for a particular intent steered the call to ACD.

User Interface & Reporting

Agent UI

There is no applicable content for this section.

Reporting

Real-time Reporting

There is no applicable content for this section.

Historical Reporting

Administrators and contact center managers use flow outcomes to gather data about self-service success. This information helps determine how well Architect flows service the customer interaction and includes:

- The total number of interactions that start a self-service operation.
- The number and percentage of interactions that fail the self-service operation.
- The number and percentage of interactions that successfully complete the self-service operation.
- The length of time successful interactions spend in the self-service operation.

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	**Inbound** • Genesys Personalized Routing with Callback (CE43)	None

General Assumptions

- The customer's response is streamed to the voicebot for processing. The voicebot recognizes the intent, understands its meaning, and captures key information into slots. These slots are then passed back to Genesys Cloud CX Architect for further use.

Dialog Engine Bot Flows

- Supports Google Speech to Text as a technology provider to enable the voice channel.
- Genesys Dialog Engine Bot Flows support US English (en-US), UK English (en-GB), and Australian English

(en-AU) languages.

Third-Party Voice Bots

- Third-party voicebot is enabled via the Integrations Registry and informational through AppFoundry.
- Customers use their own third-party voicebot accounts for Integration Services.
- Third-party voice bots are not PCI-compliant and cannot be used in secure flows.

Amazon Lex

- Region and Language limitations are detailed in the Amazon Documentation.
- Lex integration is not HIPAA-compliant.

Google Dialogflow

- Dialogflow Language support is detailed in the Google Documentation.
- Dialogflow integration is not HIPAA-compliant.

Customer Responsibilities

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

Related Documentation

Document Version

- Version **1.1.1** last updated **June 30, 2026**

Genesys Personalized Routing with Callback (CE43) for Genesys Cloud

> **Important**
>
> This use case consolidates capabilities under [[UseCases/Current/GenesysCloud/CE01|]], [[UseCases/Current/GenesysCloud/CE03|]] and introduces routing personalization.

Route voice interactions to the best skilled resource with personalization and callback option

What's the challenge?

When customers call you, they want to speak with someone familiar with your company, someone who can quickly address their needs. If they encounter long wait times or connect to agents who lack the proper information, then calls can transfer more often, hold times increase, and the customer experiences unnecessary repetition. Any of these factors can result in a poor customer experience.

What's the solution?

Proactively address the needs of your customers when they call into your contact center, which helps drive a greater customer experience. Recognize repeat customers and route calls either to the last agent they spoke with, or to the best-skilled agents that can more effectively help address their needs. If no agents are available to address their needs appropriately, let them know their expected wait time, and offer a callback option.

Link to video

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
  - 4.3 Distribution Flow
  - 4.4 Distribution Flow
- 5 User Interface & Reporting
  - 5.1 Agent UI
  - 5.2 Reporting
- 6 Customer-facing Considerations
  - 6.1 Interdependencies
- 7 Related Documentation
  - 7.1 About Callbacks
  - 7.2 Document Version

Use Case Overview

Story and Business Context

Organizations want to provide an exceptional customer and sales service experience by reducing transfers, hold time, and frustration from repeated customer interaction with your company. Advanced routing capabilities improve efficiency and reduce hold times by sending interactions to the right agent using skills-based routing, preferred agent routing, and in-queue callbacks. The easy-to-deploy routing application contains flexible business logic and configuration options required to direct calls to the best-fit agent based on the type of request and customer context. 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	Improve the customer experience by proactively addressing the needs of the caller. Find the agents most familiar with the customers needs, or someone who has worked with the customer in the past.
Improved Employee Utilization	Ensure that more informed agents can handle customer inquiries more quickly. This enables them to handle more calls effectively and efficiently.
Increased Revenue	Ensure that the best and most skilled agents handle calls matched to their strength. This increases the opportunity to close a sale or upsell other products, which can lead to increased revenue.
Reduced Handle Time	Reduce costs and deliver exceptional customer experience by routing customers to the most appropriately skilled agents who can handle their queries more efficiently.
Reduced Interaction Abandonment	Provide clear wait times and callback options to decrease abandonment.
Reduced Transfers	Reduce the number of transfers with context-based routing which finds the best agents first.
Reduced Volume of Interactions	Decrease in inbound calls from individual callers repeatedly trying to make contact.

Summary

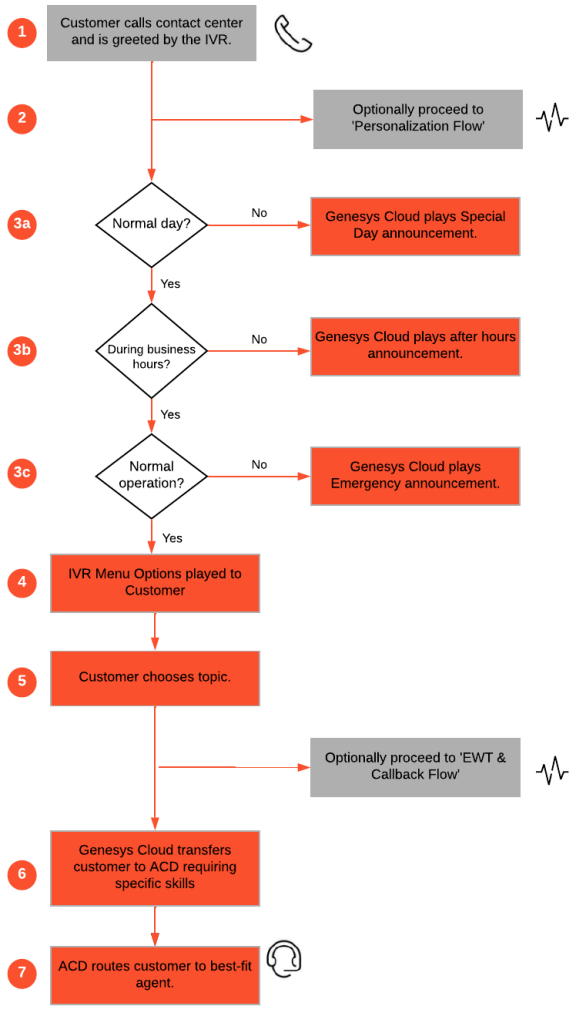
Creating a great experience for the customers and prospects that call into your contact center is paramount to creating long-lasting business relationships. The experience starts at the IVR,

presenting callers with simple options to identify or self-serve to reduce their time on the phone. Caller data retrieved from the IVR allows the system to make the best routing decision. Use the ACD routing tools to look up the caller’s phone number or account number and personalize the messaging customers hear. Preferred agent routing directs callers to a single, or set, of scored agents selected ahead of other available agents. Pairing the best agent, or the agent who last spoke to the customer, with the customer reduces handle times and drive a positive customer experience.

In case, there are not enough agents to respond to callers in a timely manner, Genesys Cloud CX automatically expands the pool of available agents to answer the call more quickly and present relevant content about the caller to an agent. Genesys Cloud CX can offer a callback option for customers to save their place in line until an agent becomes available and can call them back. Please also see the Callbacks overview.

Use Case Definition

Business Flow



Business Flow Description

1	The customer calls one of the contact center numbers.
2	If a personalized flow is configured, the customer optionally routes to it.
3	Depending on the date and time, the caller routed according to predefined announcements and schedules. These announcements are based on the customer context. For example, quality announcements or special promotions and offers for the customer, announcements for potential self-service options. Then direct the caller to:
	a. Holiday announcements and routing.
	b. After hours announcements and routing.
	c. Emergency announcements and routing.
4	The open hours messages play and the caller routes to an IVR menu.
5	The caller selects a topic or option from the IVR menu. If agents are available, they can then route

	to a callback flow or Expected Wait Time (EWT) flow.
6	The call is distributed to the best agent who: • Has the base skills to handle the original request • Has the supplementary skills determined by the customer context (optional). • If the call cannot be distributed within specific timeouts, A cascading mechanism enlarges the potential agent pool by suppressing the supplementary skill and / or reducing the skill level on the base skill.
7	After the conversation with the customer, the agent records the disposition of the call for reporting purposes.

Business and Distribution Logic

Business Logic

Using Architect, the Genesys Cloud CX flow builder, users can configure comprehensive call flows that are designed to route callers through the appropriate menus to connect them to the best agents available. Operational parameters allow you to configure routing logic such as target queues, skills assignments, interaction priority, and so on. Some parameters are only available at the DNIS or route point level. The use of operational parameters occurs either once at the beginning of the call (greeting message), or across the whole call flow independent of subsequent DTMF menu choices of the customer. Other parameters are available at both the DNIS or route point level (if no call routing has been activated) and at the level of the choice of a specific touch point.

Parameters to Configure Service Level Announcements

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

Emergency Check

- Emergency mode activation is enabled at the beginning of the call. If an emergency flag is set for an incoming call, the corresponding emergency announcement plays, and the configured action applies to the call (disconnect or transfer to another number within or external to Genesys).

Estimated Wait Time (EWT) Announcements

- Announcement of EWT to customers is handled based on predefined recordings. It is good practice to announce expected wait times to not jeopardize customer expectation.

Busy Treatment

- Messages and music play for queuing calls and can be looped until the call is answered or abandoned.

Skill Model

- Basic skills: Skills can be used to route a specific type of request or service. Genesys routing utilizes skills for enhanced routing logic and personalization, and to route callers to the most appropriate agent with the matching skill set.
- Language skills: Language skills can be used to determine the language in which a call is answered. The requested language is provided via the IVR, and if no language is provided, a default is used.

Interaction Priority

- Priority may be set on interactions as they enter and leave the IVR flow. 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 process 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 still route to an agent after a potential longer waiting time.

Transfers

- Agents can transfer calls to other agents directly, to other queues, or even to external contacts. Genesys Cloud CX supports standard blind and consult transfer functionality to help agents direct callers to the right location.

Parameters to Define Call Routing / DTMF Menus

Customers can configure up to four levels of DTMF menus, with a maximum of nine sub-options for

each level. 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.

These DTMF levels and sub-options provide the greatest flexibility to adapt the use case to specific company requirements. However, to avoid a poor customer experience, we recommend that customers use the minimum number of levels and menu choices.

Reporting Parameters

Customers use different combinations of reporting parameters to analyze the unique properties of each parameter group in reports. Reporting parameters include:

- Queue - The target agent queue to which the interaction was routed. Customers can optionally filter queue performance data based on skill requirements.
- Agent - The agent or agents who handled the interaction.
- Wrap-up code - The wrap-up, or disposition, code that the agent or agents apply to the interaction.

Audio Resources

The following audio resources are configurable by service line:

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

Distribution Flow

(1) Personalization Flow

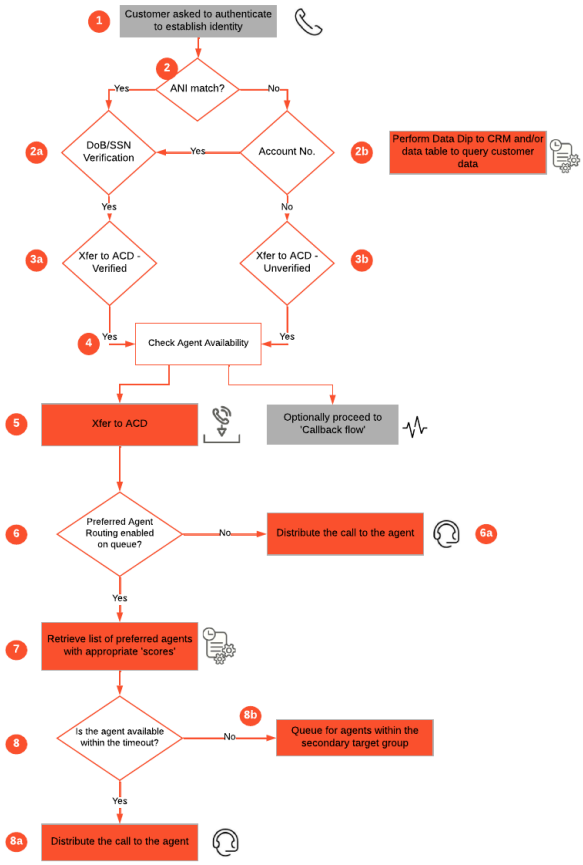
Distribution Flow

(2) Expected Wait Time Check

Distribution Logic

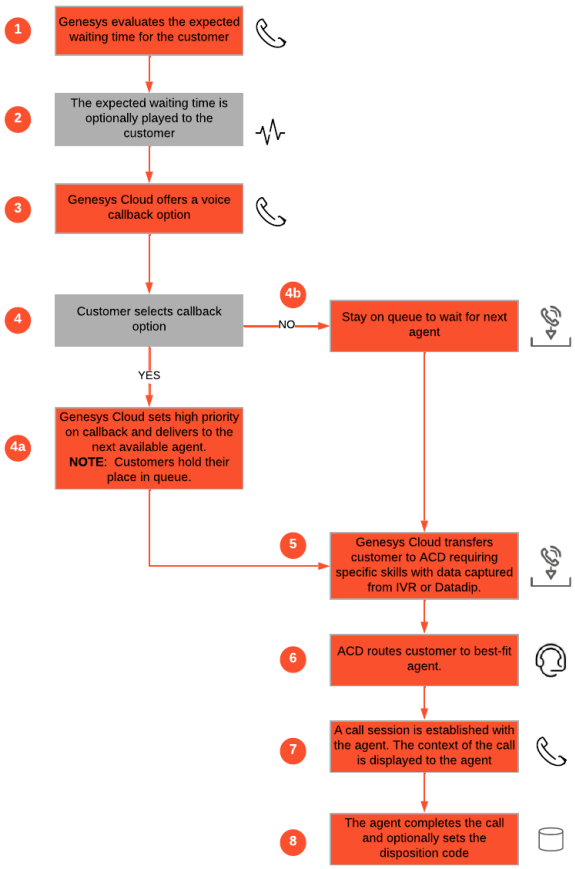
The ACD evaluation method and routing method determine distribution logic. Configuration options include:

- **All Skills Matching** - ACD considers only agents who have all the requested skills and routes the call to



Distribution Flow Description

1	The customer calls one of the numbers of the contact center, and is prompted to verify their identity.
2	The caller's telephone number (ANI) is identified
2a	If a match is found for the ANI, the caller is prompted to enter their date of birth (DoB) or Social Security Number (SSN) for identify verification.
2b	If an ANI match is not found, the system could perform a data dip or CRM integration to look up the caller's account.
3a	Once the caller has been verified, they are transferred to the Verified ACD queue.
3b	If the caller cannot be authenticated automatically, they are transferred to an Unverified queue where an agent would manually verify their identity.
4	Once the caller is placed into queue (either verified or unverified), the system checks to see if there are any appropriate agents available.
5	If appropriate agents are available, the caller would be connected. If no agents are available, the caller could be offered a callback option to retain their



the first available agent with the requested skills.

	place in queue.
6	If preferred agent routing is enabled, the system attempts to connect the caller to their preferred agent first. If not, the caller would be connected to the next available agent.
6a	If preferred agent routing is not enabled, the caller will be routed to the next available agent.
7	The system retrieves the scores for available agents.
8	The system waits for the predefined timeout
8a	If an agent is found within the timeout, the caller is connected to the appropriate agent
8b	If an agent is not found within the timeout, the caller is queued to a secondary group of agents.

Distribution Flow Description

1	Genesys calculates the Expected Waiting Time (EWT) for the call.
2	The Expected Wait Time is announced to the customer based on predefined intervals and pre-recorded announcements. (optional)
3	Genesys Cloud CX offers a callback option to the caller.
4	The caller can choose

- **Best Available Skills** - ACD routes interactions based on the highest average proficiency level for the requested skills. Genesys Cloud CX evaluates the first 100 agents to find the agent with the highest average proficiency rating. Genesys Cloud CX then calculates the average using the agent's proficiency rating for each of the requested skills.
- **Disregard Skills, Next Agent** - ACD routes interactions based on agent availability instead of skills. Genesys Cloud CX routes the call to the first available agent and ignores any skill requests.

General Distribution Functionality

- The queues, skills, and priority are configurable by (final) DTMF choice. Other targets are optional.
- Proficiencies are configurable at the agent level.
- Agent Not Responding: If an agent does not accept the voice interaction, the voice call remains in-queue and the agent is set to: "Agent not responding."
- Voice interactions can be prioritized over other media types.

Routing Methods

- Standard ACD - Genesys Cloud CX routes interactions to the next available agent. Genesys Cloud CX considers skills as specified by the evaluation method.
- Advanced Routing Options:
  - **Bullseye Routing:** Genesys Cloud CX routes interactions to a targeted subqueue of agents with specific skills. If no agents are available, Genesys Cloud CX relaxes the requested skills, based on the queue configuration, to expand the pool of agents who can receive the call.
  - **Preferred Agent Routing**: Similar to Bullseye routing, Genesys Cloud CX routes interactions to a predefined (from the call flow) set of scored agents which allows customers to connect callers with agents they have worked with in the past or from a pre-existing relationship defined in the CRM. Rather than relax skills, Preferred Agent Routing enables customers to relax score rings' thus expanding the pool of ranked agents who can receive the call. After times expire, Bullseye Routing can be implemented, or calls can route to any available agent in the queue.
  - See Advanced Routing Options for more details.

	to wait in queue, or keep their place in queue by leaving a callback.
4a	Genesys Cloud CX sets a high priority to the caller and delivers the callback to the next available agent.
4b	If the caller declines the callback, they remain in queue until the next available agent is available.
5	The caller is placed into queue with the appropriate skills captured from the IVR and data dip.
6	ACD routes the caller to the best fit skilled agent.
7	The caller is connected to the agent once they become available. The agent has access to the callers information entered in the IVR or via data dip.
8	The agent completes the call and selects a disposition code that can be used for reporting purposes.

User Interface & Reporting

Agent UI

Context Data

When a call gets distributed to an agent, the following data displays:

- An alert message to accept or decline the call
- The calling customer's phone number
- The duration of time that the call has been alerting
- The state of the call
- The queue name to which the call was targeted (as agents can work in multiple queues)
- Optionally, you could present scripts to agents to greet and interact with callers appropriately

Call Outcome / Wrap-up Code

After the call between the customer and agent has finished, an agent can apply a wrap-up code to capture the outcome of the call. Wrap-up codes could be used to capture a successful sale, identify a new lead, or even to collect a payment.

Reporting

Real-time Reporting

- Use various views, such as the *Queue Performance View*, to track improvements to key KPIs like Average Handle Time or Service Level.
- When using Preferred Agent Routing, route customers to agents they've worked with in the past. Use the *Interactions Detail View* to confirm which agents were targeted and who finally answered.
- Reduce abandoned calls by creating Custom Dashboards that show the number of calls in queue and set up a visual to show when wait times exceed defined thresholds.
- Improve agent productivity by using the *Agent Performance View* to confirm that agents are available and not spending too much time in after-call-work.

For more information about the existing views which are offered by the Genesys Cloud CX Platform, see Reports, Views and Dashboards in the Genesys Cloud CX Resource Center.

Historical Reporting

Genesys Cloud CX moved away from creating hard-coded historical reports in favor of the more dynamic performance views that can be created, saved, and exported on demand. For more information about these views, see Reports, Views and Dashboards in the Genesys Cloud CX Resource Center.

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	**Self-Service and Automation** • Genesys Customer Authentication (CE07)	None

General Assumptions

For basic call routing and personalization, any Genesys Cloud CX license suffices. For callback, the GC2 level or above applies.

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. Alternatively, SIP Qualification and Parking with a script controlled by routing are used if full GVP application is not required. This functionality is also not included within the use case.
- All announcements are provided by the customer.
- Set up a process to upload and update customer data within Genesys Context Services.

Related Documentation

About Callbacks

Learn more about callbacks and review frequently asked questions.

About callbacks

Document Version

- Version **V 1.0.2** last updated **June 30, 2026**

Genesys Contact Center Optimization (CE45) for Genesys Cloud

Analyze journeys holistically or as individual flows to understand journey outcomes such as self-service, deflection, first contact resolution and use new insights to improve efficiency and lower costs

What's the challenge?

Increasingly, contact centers are moving to provide both self-service and agent-led support. Agent-led support is more expensive, and many are looking for ways to increase self-service, reduce the need for agent escalation, while providing positive customer outcomes. Without knowing the current pattern of behavior across digital and agent-led channels, it is difficult to identify friction, escalation, and success.

What's the solution?

Genesys Contact Center Optimization begins with the understanding of customer behavior patterns within and across flows. For example, analysts can quantify self-service, drop-off and escalation for an IVR flow. It also allows you to filter by specific customer journey flows to view the data for that flow e.g customers making a payment. Additional events can also be added to the journey for comparison. Ultimately, this enables deeper insights via customizable charts and conversion analysis, allowing you to determine which customer journey flows have high rates of self service and which ones don't, simplifying the effort to improve those self-service methods for your customers which will improve first contact resolution.

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 Flow
- 4.3 Business and Distribution Logic
- 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

Contact Centers managers are interested in identifying the quality of their customer interactions, improving efficiency and ultimately, reducing unnecessary costs. This often means increasing the efficacy of self-service.

The proliferation of channels that customers utilize in issue resolution has made it that much more difficult. Businesses require a way to tie their customers' experiences together to effectively enable change.

Genesys Contact Center Optimization not only creates a cohesive customer journey across channels, it allows the business to measure, analyze, and augment customer journeys rapidly to improve the 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	Identify when customers are being transferred from self-service channels to an agent at a higher rate than anticipated and enable contact center managers to take action to ensure a high rate of self-service.
Improved First Contact Resolution	Can identify opportunities to reduce instances where customers require multiple contacts in one or more channels to resolve their issue
Reduced Administration Costs	Identify low-value interactions that self-service channels could handle. These would be types of contacts with high volumes that do not need to be handled by agents or those that result in customers making repeated calls to agents. Identify how these calls could be routed and handled by self-service channels.
Reduced Handle Time	Can identify where agents are not responding promptly or issues that take a significant amount of time to resolve using journey insights and can act accordingly to resolve.
Reduced Interaction Abandonment	Can identify when customers' abandonment rate is higher than anticipated and take action to ensure customers access their desired services.

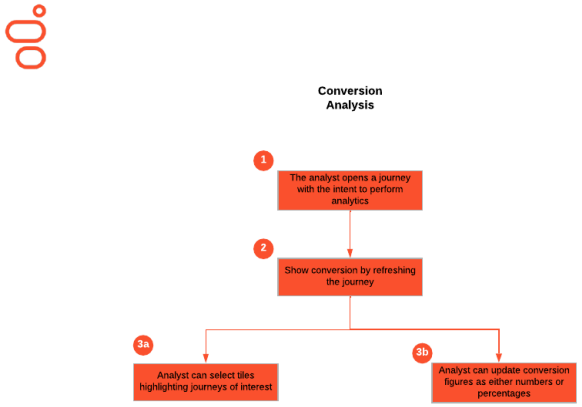
Summary

Genesys Contact Center Orchestration maximizes self-service capabilities within omnichannel service journeys, seamlessly integrating Human Assisted and Self-Service Contact Center channels. Service Journey analysis emphasizes enhancing internal efficiencies and elevating the customer experience. With over 82% of customers utilizing multiple Contact Center channels to resolve issues, and more than 70% of companies measuring First Contact Resolution (FCR) and Issue Resolution (IR) without cross-channel metrics, the need for comprehensive measurement is clear. Besides CSAT, FCR and IR are the leading metrics for assessing customer satisfaction in Contact Centers.

Use Case Definition

Business Flow

Conversion Analysis



Business Flow Description Business Flow Description: Conversion Analysis

1. The analyst opens a journey with the intent to perform analytics
2. Journey is refreshed, providing conversion rates at each step.
3. Paths of interest are analyzed by:

- Selecting the tiles representing the path you would like to explore, confirm the selections and the calculated results will up update to show you conversion rates at each step.
- The analyst can update conversion figures as either numbers or percentages

Business Flow

Journey Analysis

Business and Distribution Logic

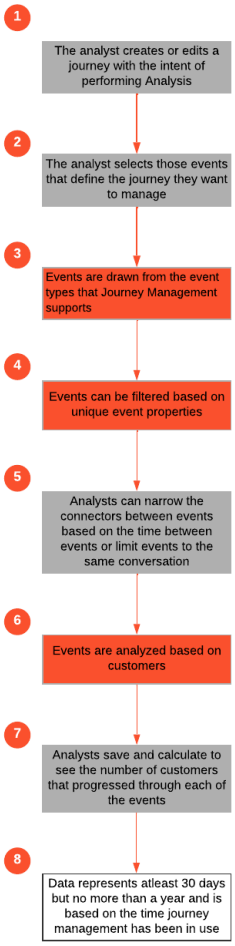
Business Logic

For journey analyzer and conversion analysis, Customer will require journey management for the contact center SKU and permission from their company’s administrator. There are two different types of roles for permissions. These are view only and edit related permissions.

Channels & Events include:

Voice

- Analytics Detail Events (ADE)
- acdStartEvent
- acdEndEvent
- customerStartEvent
- customerEndEvent
- flowStartEvent
- flowEndEvent



Business Flow Description

1. The analyst creates (or edits) a journey with the intent to perform analysis
2. From the event list, the analyst selects those events that define the journey they want to measure
3. Events are drawn from the event types that Journey Management supports and can be assembled in any order across channels
4. Events can be filtered based on unique event properties. For example, a language for a bot will define a step where users interacted with a bot in a specific langue whereas a bot with no language filter will be those that engaged with the bot across all supported languages
5. Analysts can narrow the connectors between events based on time between the events or limit the events to the same conversation
6. Events are analyzed based on customers. Customers is the primary joining property between the events.
7. Analysts save and then calculate to see the number of customers that progressed through each of the events assembled into the journey.
8. Data represents at least 30 days but no more than a year and is based on the time Journey Management has been in use.

- outboundInitEvent
- userStartEvent
- userEndEvent
- voicemailStartEvent
- voicemailEndEvent
- wrapUpEvent
- afterCallWorkEvent
- contactUpdateEvent

Bots

Bot Events

- botSessionStart
- botSessionEnd
- botSessionTurn

Distribution Logic

N/A

User Interface & Reporting

Agent UI

Conversion Analysis

Conversion Analysis will be able to take advantage of your organizations Analytics Detail Events and native Genesys Cloud Bot Events. A user can view conversion rates from any starting point and along any path; highlighting customers that completed the event and those that dropped out.

Reporting

Real-time Reporting

With Genesys Contact Center Optimization, you can get to the heart of your customer’s journey.

Build customer journeys and visualize customer behavior in aggregate to uncover journeys resulting in self-service, error, agent escalation, transfer to an agent.

Determine thresholds for each Contact Center metric you’d like to measure and be alerted when anomalies occur.

Genesys is working on providing more customer journey reporting in the future, including instant previews, custom KPIs, and behavioral segmentation.

Add pre-defined metrics to inform charts and track over time (Coming soon)

Simplify root cause analysis with AI, revealing reasons for high and low performing customer journeys. (Coming Soon)

Historical Reporting

Genesys Cloud includes performance views and dashboards that enable analysts to examine interaction data across time. We also have A3S, an expert application service, that can be used to explore and analyze historical contact center data.

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

N/A

Customer Responsibilities

For charts and conversion analysis, Customer will require Contact Center Optimization SKU and permission from their company’s administrator.

Document Version

- Version **V 1.0.0** last updated **June 30, 2026**

Rule-Based Decisions by Genesys (CE46) for Genesys Cloud

Give customers the ability to develop, author, and evaluate business rules to improve classification and routing decisions.

What's the challenge?

Customers want to have a seamless and scalable way to handle complex business rules within their organization. They want to be able to author business rules for the purpose of making decisions, test these business rules to ensure they are optimized and have the capabilities to better understand these business decisions and the usage of rules. They want an all-in-one solution for creating and managing Business Rules.

They want to have more power when creating and managing business rules for routing. Dependencies on IT and technical team hampers agility and innovation. Governance of such rules is increasingly difficult if there are multiple channels and not a single place to monitor changes and audit.

What's the solution?

Rule-Based Decisions provides the power to the business users to develop, author, and evaluate business rules. It allows organizations to centralize the definition, management, and execute complex sets of rules and logic in a consistent and automated manner. IT teams still can govern the business rules centrally without the hassle of ensuring rules for each and every channel. Users can test business rules to make sure they work properly and are optimized. It gives them the ability to manage, search, arrange, and group them for better administration. Rule-Based Decisions also provides capabilities to better understand business decisions and usage of rules and APIs or other development tools for integrating with other applications such as ERP systems, CRM software, supply chain suites, among many others.

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 Flow
  - 4.3 Business and Distribution Logic
- 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

Rule-Based Decisions is a capability of Genesys Cloud that provides the ability to develop, author, and evaluate business rules. A rules engine, often referred to as a business rules engine (BRE) or a rules-based system, is a software component or system that allows organizations to define, manage, and execute complex sets of rules and logic in a consistent and automated manner. A business rule is a piece of logic defined by a business and its execution is important for the running of the business. Multiple business rules, essentially if-then scenarios, can be considered together to make business decisions. Depending on how the decision is defined, the decision process can execute any number of logic steps and actions to arrive at a logical output.

Rule-Based Decisions provides the below capabilities:

- Business users can author business rules for the purpose of making decisions.
- Test business rules in order to make sure they work properly and are optimized.
- Give users the ability to manage, search, arrange, and group them for better administration.
- For a decision table, arranging would mean sequencing them in rows. For individual rules which might be packaged together, arranging will mean sequencing and ordering them. A decision table will be governed by multiple policies like First match, All match, Last match etc. Our default policy is First Match.
- Provide capabilities to better understand business decisions and usage of rules.
- These rules are evaluated in a Rules Engine based upon requests received from client applications (Genesys as well as external)
- Provide APIs or other development tools for integrating with other applications such as ERP systems, CRM software, supply chain suites, among many others.

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	Correct Routing leads to quicker and efficient resolution which increases customer satisfaction.
Improved Employee Utilization	Better routing leads to Agents using their time better and increasing their efficiency.
Improved First Contact Resolution	Every customer is routed correctly using a no-code engine built for context, control and speed.
Reduced Handle Time	Routing decisions are based off of structured business rules and decision tables which leads to a quicker resolution of issues.

Use Case Benefits	Explanation
Reduced Transfers	Routing calls to agents based on custom business rules improves accuracy and reduces the need for internal transfers.

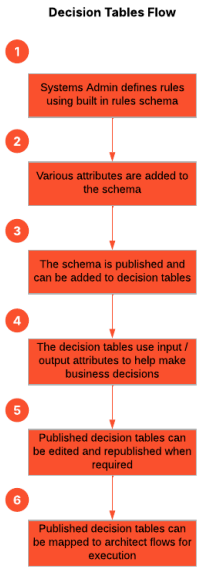
Summary

Rule-Based Decisions is used to create and execute structured business logic at scale through decision tables, for classification and routing decisions. It is used to create rules schemas and decision tables to define stateless business logic, invoke decision tables from a flow to execute routing and handling rules for an inbound interaction and make real-time updates to rules parameters to allow intra-day changes to the system. Rule-Based Decisions will provide customers with an all-in-one solution to create and manage business rules and logic for CX and EX orchestration.

Use Case Definition

Business Flow

Decision Tables Flow

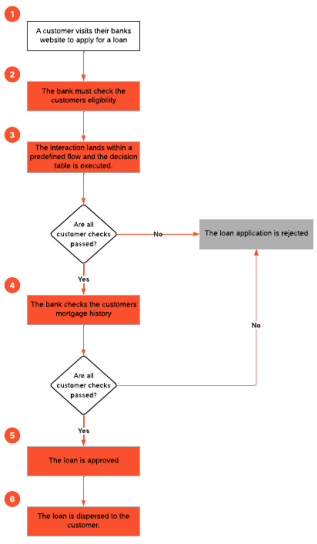


Business Flow Description

1. A systems admin defines rules / constraints using a built-in rules schema
2. Various attributes are added to the rules schema
3. The schema is published and can be added to decision tables.
4. Decision tables use rules schemas to help make business decisions for Genesys Customers using input and output attributes.
5. Published decision tables are versioned and can be edited and republished when needed.
6. Published decision tables can be mapped to architect flows for execution.

Business Flow

Customer Journey Flow



Business Flow Description

1. A customer visits a bank website looking to apply for a loan
2. The bank must check the customers eligibility using the rules schema from a Genesys Decision table
3. The interaction lands inside a predefined flow where the decision node is activated and the decision table is executed
4. If all checks are passed based on decision tables, the bank the checks the customers mortgage history
    - If the customer fails the checks based on the decision tables rules, the loan is rejected
5. If the customer passes the mortgage check, the loan is approved

- If they fail the mortgage check, the loan is rejected

6. The loan is dispersed to the customer.

Business and Distribution Logic

Business Logic

Rules Schema

- The systems Admin uses the built in Rules Schema to define the boundary conditions and constraints of a decision table.
- The schema has a name and description and will support various attribute types.
- The schema builder supports all major attribute definition types as needed for Rules Schema.
- Once saved, an attribute is added to the schema.
- Schema builder also supports platform entities to be added as attributes. Once a platform entity is added to a schema, it inherits all properties of that object for that organization.
- Multiple types of attributes can be added to the schema.
- The schema can be saved as a draft and then published when all details are confirmed.
- Once published, the schema becomes active and can be used in decision tables.

Decision Tables

- Decision tables support multiple inputs and outputs.
- The rules Admin can choose the comparator for an attribute and define Default Values whenever necessary.
- “Add Rows” is used to add more rows of business logic to the decision table.
- The final decision table is populated and can be saved to be published later.
- Published tables can be edited by an admin and republished later. The tables are all versioned.
- Decision tables can also be copied / duplicated.

User Interface & Reporting

Agent UI

N/A

Reporting

Real-time Reporting

N/A

Historical Reporting

N/A

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

N/A

Customer Responsibilities

- Customers provide their own rules schema, including required attributes and value types.
- Customers build their own decision tables to define their business logic.
- Customers manage their own versioning, publishing and governance.
- Monitor system behavior and adjust rule parameters as needed.

Document Version

- Version **V 1.0.0** last updated **June 30, 2026**

Genesys Virtual Agent (CE47) for Genesys Cloud

What's the challenge?

Contact centers are growing volume at a rapid pace. Hiring Agents to balance that volume is expensive and not quick enough. Contact Centers are looking to provide Agent like experiences to consumers quickly and efficiently. As consumer preference and increasingly advanced self-service options move “easy” questions out of the contact center, agents are left with complex issues to solve, for customers who have expectations that are higher than ever before. This can lead to increased interaction transfers. Virtual Agents are here to help! Using the power of Generative AI and Large Language Models (LLMs). They can mimic a more natural conversation, like an agent, and can work though complex issues that might arise.

What's the solution?

Virtual Agent allows our customers to autonomously begin, and complete conversations in real time. The VA will use LLMs to understand what the customer wants to accomplish, walk them through a task following a business process, or surface the appropriate knowledge articles to get the job done. Virtual Agents can be deployed onto both voice and digital channels, all built in a no-code editor within Genesys Architect. Virtual Agents can be trained from existing customer transcripts through the Intent Miner tool to get started more quickly. After a VA completes a conversation, it will use Generative AI to perform the same after call work activities like writing a summary, tagging a wrap code, and providing next steps. AI-led self-service empowers companies to scale their customer interactions while improving the experience. This in turn improves first contact resolution rates and reduces transfers.

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
  - 6.2 Document Version

Use Case Overview

Story and Business Context

The rise of digital and voice channels has led to heightened customer expectations and a significant increase in the volume of interactions that companies must manage when servicing their customers. As organizations increasingly embrace Artificial Intelligence (AI), many are implementing virtual agents to engage with customers. Virtual Agents answer queries and automate various tasks across digital platforms such as websites, mobile apps, social media, SMS, and messaging applications.

Virtual agents play a crucial role in alleviating the pressure on contact center employees while enhancing the overall customer experience and managing costs effectively. Virtual agents operate 24/7, providing immediate assistance answering questions, performing tasks and seamlessly handing over to a human agent whenever necessary.

Genesys' innovative hybrid approach combines Dialog Engine Bot Flows and advanced Generative AI and LLM technology, delivering an exceptional experience for customers and agents.This hybrid approach provides the trust and transparency in a more traditional flow based experience, while making the conversation more flexible and dynamic through the use of LLMs.

For customer service agents, the benefits are equally impressive. They receive concise summaries of conversations handled by virtual agents, allowing them to quickly grasp the context and address customer needs with speed and accuracy. Similar LLMs and Generative AI are found in Agent Copilot, to help make agents more efficient.

End customers will experience a new level of service as our virtual agents respond in a natural, conversational manner. When they have questions, they won't have to search through lengthy articles; instead, answers are highlighted or generated to their specific question. Whether interacting through digital channels or voice, our virtual agents understand customer needs and capture essential information to complete tasks seamlessly.

Moreover, when a virtual agent successfully concludes a conversation, it wraps up just like a human agent would, writing a summary, and assigning a wrap-up code that provides valuable insights into performance. This allows stakeholders to easily measure effectiveness and continuously improve customer 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 Customer Experience	Virtual Agent can handle more complex business inquiries and resolve customer queries quicker.
Improved First Contact Resolution	Reduce repeat callers through accurate resolution the first time
Reduced Handle Time	Customer queries are resolved in less time as Virtual Agent uses LLMs to provide highly accurate

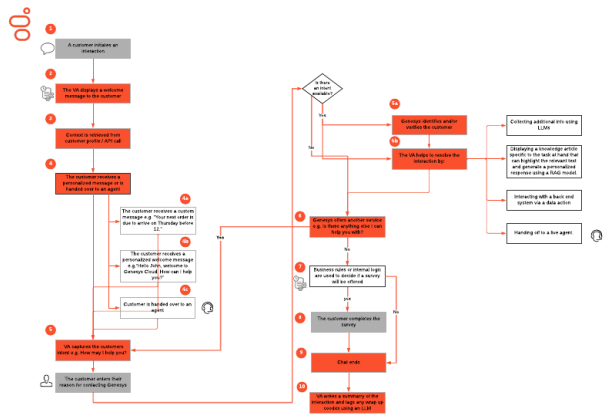
Use Case Benefits	Explanation
	information to resolve them as quickly as possible.
Reduced Transfers	More accurately identify customer intent, routing to the right queue

Summary

Genesys Virtual Agents use LLMs to help customers find the information they are looking for to resolve their queries quickly and with high accuracy. Virtual Agents can understand the customers intent and provide quick and accurate responses. They have the ability to summarize an answer from a single article so that they can address the customers question directly, rather than giving a verbose response that customer must read. Virtual Agents provide more human level contextual understanding than other bots as well as having the ability to hold complete conversations, store the history and provide automatic wrap-up codes.

Use Case Definition

Business Flow



Business Flow Description

1. An interaction is initiated (reactive or proactive) across a supported channel.
2. The customer receives a standard welcome message from the VA.
3. Customer information and/or context is retrieved from:
   - Customer profile information in External Contacts
   - API call to third-party data source
1. The customer receives a personalized message or is handed over to an agent. Examples include:
   - Custom message or update: “Your next order is due to arrive on Thursday before 12.
   - Personalized welcome message: “Hello Shane, welcome to Genesys Cloud. How can I help you?”
   - Customer is handed over directly to an

agent because they owe an outstanding balance.

1. Assuming the customer has moved on from the Personalization stage, the conversation continues with the VA, which asks an open-ended question like: “How may I help you?” to determine intent and capture the customer’s **[BL1]**
    - If intent and slots are returned, the conversation moves to the correct point in the interaction flow, for example;

1. An interaction is initiated (reactive or proactive) across a supported channel.“I see you want to book an appointment for Friday, what time?”
    - The VA continues to follow the steps in the task to complete the interaction by:
    - Collecting additional information, using LLMs to understand a variety of responses
    - Display a knowledge article specific to the task at hand
    - Interact with a back end system via a Data Action

1. Display an article from the knowledge base and:
    - Highlight the relevant text in the article to answer the user’s question
    - Generate a personalized response using a RAG (Retrieval Augmented Generation) model
    - Handoff to live agent

1. Upon completion of a task, the VA asks if there are any follow ups, by asking something like: “Is there anything else I can help you with?”
    - If the customer responds “yes,” they return to Step 5: “How may I help you?”
    - If the customer responds “no,” then the conversation returns to the interaction flow
    - If the customer responds with a more advanced answer, then determine

intent and entities for further processing.

1. Customer information and/or context is retrieved to determine whether to offer a survey.**[BL2]**
    - If a survey is offered, the interactions is sent to a chatbot.
    - If no survey is offered, the interaction flow shows a goodbye message and ends

1. The survey is executed. The survey questions are configurable by the customer on a business-as-usual basis in the chatbot and therefore no dialog flow is defined here.
2. The interaction flow presents a goodbye message and ends the chat
3. The VA writes a summary of what occurred, tags any wrap up codes using a Large Language Model, and either transfers to an agent to continue assisting the conversation, or closes the interaction.

Business and Distribution Logic

Business Logic

NLU:

- Intents: The goal of the interaction. For example, a “book flight” intent returned by the NLU will direct a user to the related task and walk them through the process.
- Slots: Additional pieces of key information required to complete a task or answer a question. For example “Book a flight to Paris” would extract the slot for “Destination” with the key word of Paris. Slots can be filled in the initial request or throughout the flow when needed.

LLM:

- Large Language Model: LLMs are trained by simply providing a description of what needs to be done. For example, a “book flight” intent would have a description of something like “a user is requesting to book a flight with the airline” and no matter how a user might ask for this, the LLM will identify which intent they are requesting
- LLMs are also used to extract slots. Again, simply give a description like “The city the user wants to fly to” and using its pre-existing knowledge of the world, the LLM will identify any city the user might request.

- Retrieval Augmented Generation (RAG): Virtual Agents can use RAG models to first Retrieve the correct article from the knowledge base, Augment the query to the LLM using the article, and Generate a personalized response to the users question. RAG models limit the knowledge of the LLM to only the business content provided in the article for increased accuracy and domain knowledge, while still maintaining the highly conversational nature of an LLM.

BL1: Agent Handoff: The customer can ask to connect to an available agent. At that point, the Virtual Agent disconnects and the chat transcript (excluding sensitive data) appears in the agent desktop. The VA will also send a summary of the conversation so far.

BL2: Survey: The customer can determine whether to address a survey or not. This survey can be based on:

- Customer profile information in External Contacts
- Customer journey data
- API call to third-party data source

Distribution Logic

N/A

User Interface & Reporting

Agent UI

Chat transcript between customer and Virtual Agent is populated in the chat interaction window in the agent desktop. The summary is surfaced in the interaction panel.

Reporting

Real-time Reporting

With Genesys Cloud, you can do flow reporting and use flow outcomes to report on VA and Bot Flow intents.

See the Flows Performance Summary view and use flow outcome statistics to help you determine performance issues for specific VA and Bot Flows and gather data about self-service success. Use the VA and Bot Flow flow data to improve outcomes. **Note:** Flow outcome statistics requires the customer to implement flow outcomes.

Use the Flows Performance Detail view to see a breakdown of metrics by interval for a specific VA and Bot Flow flow, and to see how VA and Bot Flow interactions enter and leave a chat flow.

The Flow Outcomes Summary view displays statistics related to chats that enter Architect flows. These statistics can help you determine how well your VA and Bot Flow flows serve customers and gather data about self-service success.

Historical Reporting

In the knowledge optimizer dashboard, you can analyze the effectiveness of your knowledge base. In this view, you can see the following metrics:

- All queries in a specific time frame and the breakdown, in percentages, of answered and unanswered queries.
- All answered queries in a specific time frame and the breakdown, in percentages, of the application from which the conversation originated.
- All unanswered queries in a specific time frame and the breakdown, in percentages, of the application from which the conversation originated.
- Top 20 articles and the frequency in which an article appeared in a conversation.
- Top 20 answered queries and the frequency in which each answered query appeared in a conversation.
- Top 20 unanswered queries and the frequency in which each unanswered query appeared in a conversation.

see Knowledge Optimizer

The Bot Optimizer Dashboard can be used Architect to view performance and high-level operational metrics for a selected Genesys Dialog Engine Bot Flow or Genesys Digital Bot Flow. This data helps you improve and troubleshoot your VA and Bot Flow. You can also filter these results by specifying a date range or a configured language.

File:AA2638F7-2967-4D26-B46B-58F9942DE4DA.jpg

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

Customers and/or Genesys Professional Services are responsible for managing the Virtual Agent NLU, rules engine and uploading their own knowledge base

articles into Genesys Knowledge Workbench to be used by Virtual Agent.

Customer Responsibilities

- The Customer needs to provide a KB or the articles that will be the elements of the Knowledge Base.
- Flow Outcome Statistics capabilities require the customer to implement flow outcomes. They do not come out of the box.

Document Version

- Version **V 1.0.0** last updated **June 30, 2026**

Unified Experience from Genesys and ServiceNow (CE48) for Genesys Cloud

Manage real-time communications and process customer data on a single solution with a unified agent workspace

What's the challenge?

Customer experience employees need information and controls to manage real-time communications. They also need to review and process customer data, use business processes, and invoke workflows to service customers. These tools are often in separate systems, forcing workers to split their attention between multiple desktop applications and copy and paste data between them. This is a frustrating and error-prone situation for employees resulting in disappointing experiences for customers.

What's the solution?

A single solution with a unified agent workspace to handle communications and process customer data is the answer. Such a solution avoids overloading staff or forcing them to serve only one type of work at a time. It eliminates the frustration and errors from using multiple desktops for one task. It brings context and customer data into a single UI to streamline processes, creating an overall more efficient agent experience.

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
  - 6.2 Document Version

Use Case Overview

Story and Business Context

Unified Experience from Genesys and ServiceNow brings together real-time communications, case management, and customer data into a single orchestrated experience for customers and employees. Using a single orchestration engine from Genesys, work is delivered to the ideal customer experience employee in a unified, channel-less agent workspace. Agent supporting AI surfaces relevant knowledge and next best actions. Customer data, forms, and workflows sit alongside real-time interaction controls. Comprehensive performance data flows into the workforce engagement management capabilities for accurate forecasts, efficient scheduling, and performance management across all workloads.

Use Case Benefits*

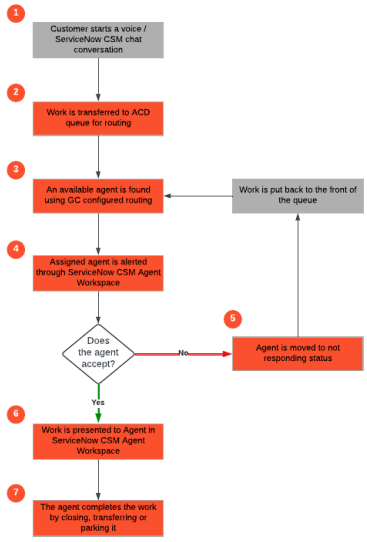
The following benefits are based on benchmark information captured from Genesys customers and may vary based on industry, lines of business or Genesys product line: *Info needed.*

Summary

Unified Experience from Genesys and ServiceNow is a joint solution based on two established leaders in their respective segments. Genesys Cloud, a leading CRM and platform, and ServiceNow Customer Service Management (CSM). Genesys Cloud routes ServiceNow chats and cases, along with all its native communications channels. It delivers work to agents within the ServiceNow CSM Agent Workspace inbox, complete with embedded interaction controls. Agents access their activity dashboard within the agent home of CSM Agent Workspace to browse their schedule, manage their shifts, review their evaluations, take their learning and development courses, and see how they rank with their peers. The result is an efficient, productive, and engaged customer experience center delivering world-class results.

Use Case Definition

Business Flow



Business Flow Description

1. A customer starts a voice conversation, ServiceNow CSM chat conversation, or ServiceNow CSM case.
2. The work is transferred to an ACD queue for routing.
3. Genesys Cloud uses the configured routing to find an available agent.
4. Unified Experience from Genesys and ServiceNow alerts the assigned agent through ServiceNow CSM Agent Workspace.
5. If the agent rejects, they are moved to not-responding and the work is put back to the front of the queue.
6. If accepted, the work is presented to the agent in ServiceNow CSM Agent Workspace with appropriate interaction and work controls.
7. The agent completes the work by closing the work, transferring the work, or parking the work.

Business and Distribution Logic

Business Logic

ServiceNow CSM case and chat queues are configured to use external routing, which uses Genesys Cloud APIs to create work routing requests in the Genesys Cloud orchestration engine. Genesys Cloud processes those requests by using attached data to route through a specified queue with the associated priority and skill requirements. The queue uses its chosen routing algorithm to identify a qualified agent, using a ServiceNow API to assign the work through CSM Agent Workspace.

Agents use CSM Agent Workspace to set their presence. This invokes a Genesys Cloud API to synchronize the user's presence between the systems. When work is delivered, it arrives in their CSM Agent Workspace inbox. Upon accepting, ServiceNow invokes a Genesys Cloud API to accept the work. Interaction controls including hold, mute (for voice), transfer, disconnect, and others are accessed in CSM Agent Workspace, which keeps Genesys Cloud synchronized through its APIs.

Distribution Logic

N/A

User Interface & Reporting

Agent UI

Unified Experience includes native controls for managing user presence, accepting and rejecting assigned work, and handling voice and digital interactions. It includes embedded components for WEM agent activity dashboard, agent copilot, and others. It is part of the ServiceNow CSM Agent Workspace, with all its rich customer data, process, and workflow tools.

Reporting

Real-time Reporting

N/A

Historical Reporting

N/A

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

It is assumed that users are licensed with the appropriate GC1, 2, or 3 tier for the interaction types and WEM features they require. It is also assumed that users are appropriately licensed and configured to access ServiceNow CSM Agent Workspace to use its capabilities.

Customer Responsibilities

Deploy ServiceNow Customer Service Management products on the Now Platform. Run the Now Platform Yokohama version. Install the Unified Experience from Genesys and ServiceNow store application.

Document Version

- Version **V 1.0.0** last updated **June 30, 2026**

Genesys Social Listening (CE49) for Genesys Cloud

Seamlessly integrate social media customer care into the all-in-one Genesys Cloud platform, enabling you to monitor, analyze, and engage with customers across social channels.

What's the challenge?

Today's customers expect seamless, omnichannel experiences—including on social media. They voice their opinions, seek support, and engage with brands across platforms like Twitter, Facebook, Instagram, and LinkedIn. However, many CCaaS providers struggle to integrate social interactions into their customer experience (CX) strategy, leading to missed opportunities, reputation risks, and customer dissatisfaction.

Given below are some of the key challenges

1. **Fragmented Customer Journeys** – Without social listening, brands lack visibility into customer interactions happening outside traditional channels, making it difficult to provide consistent, personalized support.
2. **Reactive vs. Proactive Engagement** – Many contact centers rely on customers reaching out with issues rather than proactively identifying sentiment shifts, potential crises, or brand advocacy moments.
3. **Brand Reputation Management** – Negative feedback can escalate quickly on social media. Without real-time monitoring and response capabilities, brands risk reputational damage.
4. **Lost Revenue Opportunities** – Customers often express purchase intent, complaints, or competitive comparisons on social media. Without social CX integration, companies miss valuable sales and retention opportunities.
5. **Scalability and Compliance** – Managing high volumes of social interactions manually is inefficient and poses compliance risks in regulated industries.

To remain competitive, CCaaS providers must offer integrated social listening and engagement capabilities, ensuring that brands can provide proactive, personalized, and efficient customer experiences across every touchpoint—including social media.

What's the solution?

Genesys Cloud Social allow companies to monitor and analyze through social listening to engage with customers across social media in real time. These capabilities enable brands to track customer sentiment, proactively address issues, and create seamless customer experiences across social channels. Social listening uses AI-driven sentiment analysis to detect emerging trends, potential

crises, and customer intent, ensuring companies stay ahead of customer expectations.

Genesys Cloud Social seamlessly integrates with existing contact center workflows, allowing agents to engage with customers across social platforms—all within a unified interface. Agents can view interactions across voice, chat, email, and social, ensuring personalized and contextual responses.

Genesys Cloud Social also helps protect brand reputation by identifying negative sentiment spikes and enabling rapid responses to prevent issues from escalating. Real-time analytics track engagement trends, campaign performance, and customer feedback, allowing companies to refine their CX strategy continuously. Social interactions can also uncover purchase intent and competitive insights, turning social engagement into revenue opportunities.

By embedding social listening and the ability to engage with social media comments into existing contact center workflows, companies scale customer engagement, improve response times, and deliver proactive, AI-powered support. This results in higher customer satisfaction, reduced operational costs, and increased brand loyalty. It also empowers organizations to leverage insights from social engagements across all orchestrated experiences that touch the Genesys Cloud platform.

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
  - 6.2 Document Version

Use Case Overview

Story and Business Context

The rise of social media as a key customer engagement channel has transformed how businesses interact with their customers. Customers are no longer limiting their service requests to traditional channels like voice and email; instead, they voice concerns, ask for help, and share feedback on platforms like X/Twitter, Facebook, Instagram, LinkedIn, and Reddit. As a result, organizations must manage an ever-growing volume of social interactions while ensuring a seamless, omnichannel customer experience.

Many companies have implemented AI-powered solutions to improve engagement, yet social interactions often remain disconnected from the broader customer experience strategy. Without integrated social listening with the ability to quickly engage with customers, businesses miss critical opportunities to proactively address concerns, protect their brand reputation, and drive engagement that leads to customer loyalty.

Genesys Cloud Social plays a crucial role in transforming customer engagement by enabling businesses to monitor, analyze, and respond to social interactions in real time. AI-powered social listening detects sentiment shifts, identifies emerging trends, and uncovers valuable insights from customer conversations. At the same time, Genesys Cloud Social ensures agents can engage with customers across all social platforms from a single interface, providing contextual, seamless support.

Genesys delivers an innovative approach by integrating these social media capabilities into the broader contact center experience. This integration ensures that social interactions are no longer siloed but instead become a key part of a brand’s customer engagement and service strategy.

For contact center agents, the benefits extend beyond engagement. They receive real-time insights and sentiment analysis, helping them prioritize and personalize interactions.

End customers experience a seamless, proactive, and responsive service experience. Whether they reach out via social media or other digital channels, AI-powered Social CX ensures their concerns are addressed promptly. Instead of waiting on hold or navigating fragmented support channels, customers receive immediate responses, personalized engagement, and issue resolution in the channel of their choice.

Moreover, when a social interaction is completed, the system automatically logs and categorizes the conversation, ensuring valuable insights are captured for future analysis. These insights empower businesses to measure social engagement effectiveness, refine their strategies, and continuously improve the customer experience.

By integrating social listening and the ability for agents to directly engage with relevant customer comments, businesses can scale engagement, drive brand loyalty, and transform social interactions into powerful opportunities for customer service, reputation management, and revenue growth.

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	Genesys Cloud Social enable real-time engagement, ensuring customers receive fast, personalized responses on their preferred social platforms.
Improved Employee Occupancy	AI-powered sentiment analysis detects customer concerns and trends, allowing businesses to address issues before they escalate.
Improved First Contact Resolution	Thanks to a variety of routing methodologies, including AI-led Genesys Cloud Predictive Routing, ensures social media interactions are routed to the right agent, reducing the need for multiple touchpoints.
Improved Insights and Visibility	Social interactions are unified with other customer service channels, providing agents with a complete view of the customer journey.
Increased Revenue	Social listening identifies customer intent, enabling businesses to capture sales opportunities and drive engagement with potential buyers.
Reduced Customer Churn	Real-time monitoring and response capabilities prevent negative sentiment from spreading and damaging brand perception. This reduces customer churn.

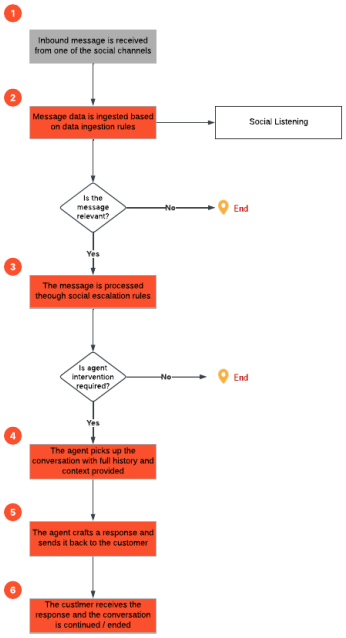
Summary

Genesys Cloud Social enables businesses to monitor, analyze, and engage with customers on social media in real time. AI-powered sentiment analysis detects trends and customer intent, allowing proactive engagement and reputation management.

The solution integrates social media interactions seamlessly with other channels, providing agents with context-rich interactions and AI-driven automation for quick responses and smart routing. Businesses can improve customer satisfaction, reduce agent workload, and unlock revenue opportunities through social engagement.

Use Case Definition

Business Flow



Business Flow Description

1. An inbound message is received from one of the social channels.
2. The message data is ingested based on the data ingestion rules to ensure that it is relevant.
3. The message is processed through Social Escalation rules to ensure that Agent intervention is required.
4. If Agent intervention is required, the agent picks up the conversation with full context and history provided.
5. The agent provides a response and sends it back to the customer via the appropriate social channel.
6. The response is received by the customer and the conversation can be continued or ended if there are more questions.

Business and Distribution Logic

Business Logic

The business logic of the process behind Genesys Cloud Social can be broken down into the following steps:

Inbound Social Message

1. Customers post messages, comments, or queries on public social media platforms such as **X (Twitter), Facebook (FB), Instagram (IG), and Google Business Profile.**
2. These messages could be general inquiries, complaints, feedback, or engagement with the brand.
3. These messages could be public or private messages

Data Ingestion

1. The system **ingests social media data** based on **Data Ingestion Rules** that are created by the users
2. These rules determine which messages are captured, filtering out noise and focusing on relevant customer interactions.

Social Escalation

1. Once the data is ingested, it is processed through **Social Escalation Rules** to determine whether it needs agent intervention.
2. Escalation criteria could include **sentiment detection, specific keywords**
3. If escalation is required, the message is routed to an agent.

Agent Engagement

1. Escalated messages require agent intervention and agents can pick them up for responses via the **Agent Desktop**.
2. The agent receives the conversation with full context and history, enabling them to provide a **personalized, informed response**.

Agent Response

1. The agent crafts a response and sends it back through the appropriate social channel.
2. Responses can be manual, or templated based (canned responses) on the nature of the inquiry.

Outbound Message to Social Channels

1. The response is sent back to the customer on the original social media platform (X, Facebook, Instagram, Google Business Profile, or others).
2. This ensures a seamless, real-time interaction between the brand and the customer.

User Interface & Reporting

Agent UI

The Social Listening Performance view page is the central location for viewing more information about social listening performance data. The data is automatically populated based on the queries created by the admins. This page provides a visual representation of the social listening performance data in the following categories:

- **Mentions Over Time Breakdown by Topic –** Displays the topic-wise social statistics for brand mentions and the keywords added in the Data ingestions rule over a specific period. By default, the data is displayed as a line chart. You can change the chart type to a pie chart and see the standard deviation.
- **Unique Users by Topic –** Displays the number of unique users over a specific period based on the topic. By default, the data is displayed as a line chart. You can change the chart type to a pie or bar chart and see the standard deviation.
- **Net Sentiment Over Time –** Displays the net sentiment percentage data over a specific period based on the topic. By default, the data is displayed as a line chart. You can see the standard deviation. The net sentiment is calculated by: ((Total Positive Posts – Total negative posts) / (Total Positive + Total Negative + Total Neutral posts)) * 100
- **Sentiment Breakdown by Topic –** Displays the topic-wise sentiment data such as Positive, Negative, Neutral, and Unknown. By default, the data is displayed as a bar chart.
- **Sentiment Breakdown by Platform –** Displays the platform-wise sentiment data percentage. By default, the data is displayed as a bar chart.
- **Mentions Breakdown by Platform –** Displays the platform-wise social listening data. By default, the data is displayed as a bar chart. You can change the chart type to a pie chart. By default, the data is displayed as a bar chart.
- **Mentions Breakdown by Topic and Platform –** Displays the topic-wise and platform-wise social listening data.
- **Content Type Breakdown by Platform –** Displays the platform-wise content type data such as Open, X (formerly Twitter), Instagram, Facebook, and Google Business Profile. By default, the data is displayed as a pie chart.

To see social listening data and metrics, click **Performance** > **Workspace** > **Social** > **Social Listening Performance**.

In all the chart types, you can right-click on the respective data point to view the drill-down information of that point along with the filters and the duration.

Set a default time zone in the workspace

You can set the default time zone in the analytics workspace before viewing any analytics view.

To set the default time zone in the workspace, follow these steps:

1. Click **Performance** > **Workspace**.
2. On the left side, from the **Time zone** drop-down menu, select the required time zone as the default time zone for the analytics workspace.

To save the view with your filter, click **Save View** .

This view updates automatically except when you use filters from the Filters pane. To see the most current data, click **Refresh** .

Customize the view

To show only certain data, customize the Social Listening Performance view using any combination of filters. For example, you can choose to show only certain filters to see certain types of data. You can also save your filter and column settings as a saved view to switch quickly between different data of interest in the same view.

Reporting

Real-time Reporting

N/A

Historical Reporting

N/A

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 **June 30, 2026**

Genesys Agent Assist (EE31) for Genesys Cloud

Monitor conversations between the customer and agent to surface contextually relevant knowledge and FAQs.

What's the challenge?

Many customers prefer to use self-service options. But when they need to speak to someone (via voice or chat), they expect that person to know all about their journey and how best to help them in real time.

What's the solution?

Provide live transcripts of the voice conversation, and relevant real-time knowledge suggestions on the agent's omnichannel desktop.

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
- 6.2 Document Version

Use Case Overview

Story and Business Context

A positive customer experience relies on the ability of the company or provider to answer a customer's request, provide excellent service, and deliver on the requested outcome. Contact centers are often the single point of contact for customers, and it is critical that agents properly and effectively handle these interactions. Agents must navigate knowledge and FAQs to find answers and resolve customer inquiries - which takes time that could be better spent on activities that improve customer service or sales outcome.

With Agent Assist, companies can rely on the power of artificial intelligence (AI) to monitor and analyze the conversation and then deliver contextual, relevant information drawn from a knowledge base to provide relevant suggestions to the agent. The agent spends time assisting the customer based on the suggested results, rather than digging for information. To improve the knowledge base for future use, an agent may verify whether the suggestions that Genesys Agent Assist AI returns are relevant.

Genesys offers Agent Assist as a native AI capability fully integrated into Genesys Cloud CX. Genesys also enables customers to use Google CCAI transcription and knowledge services for voice-based Agent Assist as an alternative.

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 Satisfaction	Agents tackle more complex business inquiries with AI assistance.
Improved Employee Utilization	A constantly-evolving knowledge base trains agents in real time.
Improved First Contact Resolution	Present relevant suggestions in real-time to help the agent resolve the caller's inquiry.
Reduced Handle Time	By empowering agents to more effectively provide answers, callers enjoy a quicker, more positive experience.

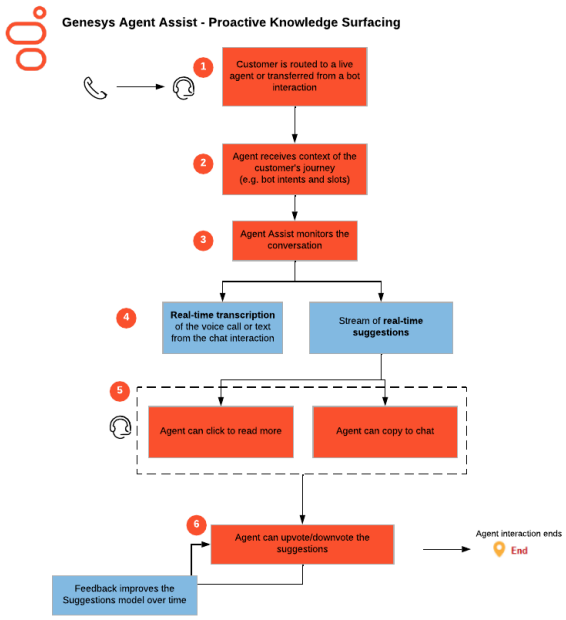
Summary

During a call or digital interaction between a customer and an agent, to assist the agent, Genesys Cloud Agent Assist presents relevant, real-time suggestions to the agent in their desktop. Agent assist provides contextually relevant knowledge suggestions, such as answers to frequently asked questions to the agent in real time. The knowledge empowers the agent, provides the right information at the right time, and enables the agent to provide better support to a end-customer.

Use Case Definition

Business Flow

Proactive Knowledge Surfacing



Business Flow Description 1. Genesys connects the user to the live agent.

2.The agent sees the context (for example bot intents and slots) of the users journey in the agent desktop.

3.Genesys Agent Assist monitors the conversation.

4.During the voice conversation, the following happens:

For Voice Interactions:

- Real-time audio of the voice interaction is streamed to Genesys Transcription service.
- Agent Assist displays the real-time transcription of the voice call.
- Agent Assist service returns real-time knowledge suggestions.
- The suggested content is displayed to the agent automatically in a live stream of suggestions during the conversation.

For Digital Interactions:

- Agent Assist service returns real-time knowledge suggestions.
- The suggested content is displayed to the agent automatically in a live stream of suggestions during the conversation.

5.The agent can do the following with the live stream of suggestions:

- Click to expand the suggested content to read more (BL1).
- For Voice: Read the suggested content directly to the customer or use it to assist with the interaction (BL2).

- For Digital: one click copy the content to the chat window.

6.The agent can rate (upvote/downvote) to improve the AI suggestions model over time. The more that Agent Assist is used and content rated by agents, the better the suggestions will be in the future. (BL3, BL4).

Business and Distribution Logic

Business Logic

BL1: Review knowledge: The agent performs a high-level assessment to ensure the information returned from Agent Assist is appropriate and relevant to the current conversation.

BL2: Leverage knowledge: The agent communicates relevant information to the end-customer, or they use the information to perform the required "back-end" actions to resolve the customer issue.

BL3: Rate knowledge: Agent assist may provide an agent with multiple pieces of information during the interaction. Agents should rate the information using the thumbs up / thumbs down buttons to verify as r*elevant* or i*rrelevant*.

BL4: Resolve issue or continue conversation: If the end-customer issue is not adequately resolved, the agent continues the conversation with the end-customer to trigger Agent Assist to surface additional information. If Agent Assist is unable to provide appropriate information to resolve the end-customers issue, Agents should follow their corporate escalation policy to ensure that expectations are fulfilled.

Distribution Logic

Since the end-customer is already speaking with an agent in real time, any subsequent call steering is likely to be manually directed by the agent.

User Interface & Reporting

Agent UI

There is no applicable content for this section.

Reporting

Real-time Reporting

The knowledge dashboard for Genesys Agent Assist gives overview about knowledge base article activities. Genesys Agent Assist metrics and reporting provides insight about presented, opened and copied articles. For more information, see https://rcstaging.wpengine.com/?p=280180

Historical Reporting

In the knowledge optimizer dashboard, you can analyze the effectiveness of your knowledge base. In this view, you can see the following metrics:

- All queries in a specific time frame and the breakdown, in percentages, of answered and unanswered queries.
- All answered queries in a specific time frame and the breakdown, in percentages, of the application from which the conversation originated.
- All unanswered queries in a specific time frame and the breakdown, in percentages, of the application from which the conversation originated.
- Top 20 articles and the frequency in which an article appeared in a conversation.
- Top 20 answered queries and the frequency in which each answered query appeared in a conversation.
- Top 20 unanswered queries and the frequency in which each unanswered query appeared in a conversation.

see https://help.mypurecloud.com/articles/knowledge-optimizer-overview/

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** • Genesys Messaging (CE34) **Inbound** • Genesys Call Routing (CE01)	**Self-Service and Automation** • Genesys Chatbots (CE31) • Genesys Voicebots (CE41) **Workforce**	None

All of the following required:	At least one of the following required:	Optional	Exceptions
		Engagement • Genesys Agent Assist (EE31)	

General Assumptions

Customers and/or Genesys Professional Services are responsible for managing and uploading their own knowledge base content into Genesys Knowledge Workbench to be used by Agent Assist.

Customer Responsibilities

Document Version

- Version **v 2.0.0** last updated **June 30, 2026**

Genesys Agent Copilot (EE32) for Genesys Cloud

Automatically surface contextually relevant information from a knowledge base during customer conversations.

What's the challenge?

Agents balance many tasks simultaneously: speaking to customers (sometimes more than one at a time), reviewing data, finding answers, planning what to say and do next, and capturing notes. As consumer preference and increasingly advanced self-service options move “easy” questions out of the contact center, agents are left with complex issues to solve, for customers who have expectations that are higher than ever before.

To deliver standout customer experiences, agents must have useful data and insights, within the work space that they’re already using, at the moment of need.

What's the solution?

Genesys Cloud Agent Copilot empowers contact center agents with AI-driven guidance during and after customer interactions. Genesys Cloud Agent Copilot determines customer intent, automatically surfaces knowledge and guides agents to their next best actions, summarizes interactions, and predicts wrap-up codes.

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
  - 6.2 Document Version

Use Case Overview

Story and Business Context

Positive customer experiences can only happen when agents can answer a customer's request, provide empathetic, personalized service, and deliver on the requested outcome. In many contact centers, agents must navigate multiple processes and tools to look up knowledge and FAQs to find answers and resolve customer inquiries which takes time, leaves customers sitting on hold, and causes high average handle time and long waits.

With Agent Copilot, companies can leverage the power of artificial intelligence (AI) to support agents as they serve customers digitally, or on the phone. Genesys Cloud Agent Copilot determines customer intent, automatically surfaces relevant knowledge, and guides agents to their next best actions – such as what to say next, what workflow to kick off, how to follow up, and more. It then summarizes interactions by generating text and predicts wrap-up codes. Agents spend time personalizing the assistance they offer each customer, and providing superior answers based on suggested results, rather than digging for information and writing call notes.

It is possible to create rules based on events like starting an interaction, ending a conversation, or transferring it to another queue or agent. When an event like this happens, it will be possible to configure the appearance of an article from the knowledge base, triggering a script or a canned response.

Agent Copilot also allows to train a NLU model that detects Intents based on utterance. The detection of these intents will allow the user get an article from the knowledge base, triggering a script or a canned response, as with the events described above.

After the completion of the conversation between the agent and the user, a summary of the conversation is generated. This summary can be reviewed, modified, copied and pasted as part of the notes of the interaction.

Genesys offers Agent Copilot as a native AI capability fully integrated into Genesys Cloud CX.

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 Satisfaction	Agents tackle more complex business inquiries with AI assistance.
Improved Employee Utilization	A constantly-evolving knowledge base trains agents in real time.
Improved First Contact Resolution	Present relevant suggestions in real-time to help the agent resolve the caller's inquiry.

Use Case Benefits	Explanation
Reduced Handle Time	By empowering agents to more effectively provide answers and taking care of interaction notes, customers enjoy a quicker, more positive experience. Also the agent will have a summary of the interaction, the resolution of it and a reason for that contact.

Summary

During customer interactions, Genesys Cloud Agent Copilot assists agents by presenting relevant, next best actions to the agent in their workspace. Agent Copilot understands customers' intents and provides agents with relevant answer highlighted knowledge, canned responses, and scripts. When agents move to after call work, Genesys Cloud AI creates an interaction summary and predicts wrap codes.

Use Case Definition

Business Flow

Agent Copilot

Business and Distribution Logic

Business Logic

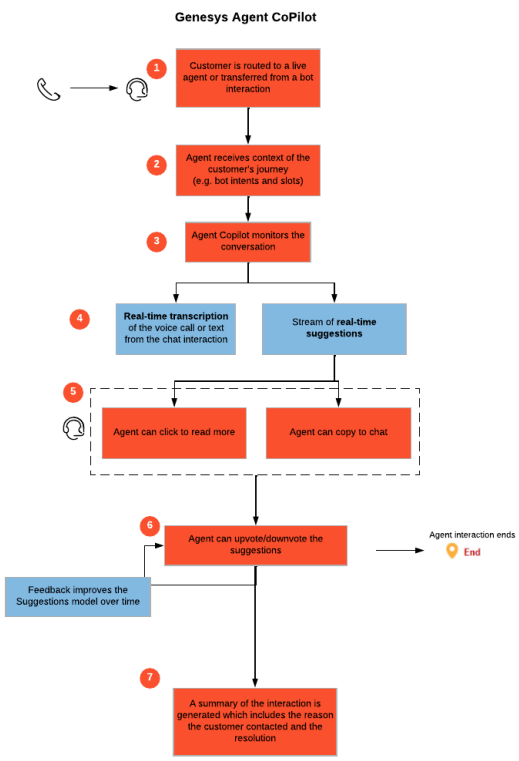
BL1: Review knowledge: The agent performs a high-level assessment to ensure the information returned from Agent AssistAgent Copilot is appropriate and relevant to the current conversation.

BL2: Leverage suggestion: The agent communicates relevant information to the end-customer, or they use the information to perform the required "back-end" actions to resolve the customer issue.

BL3: Rate suggestions: Agent Copilot may provide an agent with multiple pieces of information during the interaction. Agents should rate the information using the thumbs up / thumbs down buttons to verify as relevant or irrelevant.

BL4: Resolve issue or continue conversation: If the end-customer issue is not adequately resolved, the agent continues the conversation with the end-customer to trigger Agent Copilot to surface additional information. If Agent Copilot is unable to provide appropriate information to resolve the end-customers issue, Agents should follow their corporate escalation policy to ensure that expectations are fulfilled.

BL5: End Coversation: Agent reviews the AI generated note and Wrap Up Codes. Agent selects the wrap up code from the AI suggested or finds the appropriate code.



Business Flow Description 1. Genesys connects the user to the live agent.

2.The agent sees the context (for example bot intents and slots) of the users journey in the agent desktop.

3.Genesys Agent Copilot monitors the conversation.

4.During the voice conversation, the following happens:

For Voice Interactions:

- Real-time audio of the voice interaction is streamed to Genesys Transcription service.
- Agent Copilot displays the real-time transcription of the voice call.
- Agent Copilot uses Natural Language Understanding to understand Customers Intents
- Agent Copilot service returns real-time next best actions (knowledge, Canned Response, Script).
- The suggested action is displayed to the agent automatically in a live stream of suggestions during the conversation.

For Digital Interactions:

- Agent Copilot uses Natural Language Understanding to understand Customers Intents
- Agent Copilot service returns real-time next best actions (knowledge, Canned Response, Script).
- The suggested next best action is displayed to the agent automatically in a live stream of suggestions during the conversation.

5.The agent can do the following with the live stream of suggestions:

- Click to expand knowledge suggested content to read more or copy to the digital

Distribution Logic

Since the end-customer is already speaking with an agent in real time, any subsequent call steering is likely to be manually directed by the agent.

User Interface & Reporting

Agent UI

N/A

Reporting

Real-time Reporting

The Agent Copilot Performance dashboard for Genesys Agent Copilot gives overview about knowledge base article activities. Genesys Agent Copilot metrics and reporting provides insight about presented, opened and copied articles. For more information, see https://rcstaging.wpengine.com/?p=280180

Historical Reporting

In the knowledge optimizer dashboard, you can analyze the effectiveness of your knowledge base. In this view, you can see the following metrics:

- All queries in a specific time frame and the breakdown, in percentages, of answered and unanswered queries.
- All answered queries in a specific time frame and the breakdown, in percentages, of the application from which the conversation originated.
- All unanswered queries in a specific time frame and the breakdown, in percentages, of the application from which the conversation originated.
- Top 20 articles and the frequency in which an article appeared in a conversation.
- Top 20 answered queries and the frequency in which each answered query appeared in a conversation.
- Top 20 unanswered queries and the frequency in which each unanswered query appeared in a conversation.

see https://help.mypurecloud.com/articles/knowledge-optimizer-overview/

interaction.

- Click to launch suggested Script pages to follow a script.
- Click to expand Canned Responses or copy to the digital interaction.

6.The agent can rate (upvote/downvote) to improve the AI suggestions model over time. The more that Agent Copilot is used and content rated by agents, the better the suggestions will be in the future. (BL3, BL4).

7.Once the conversation is completed, it generates a summary of it, the reason the customer contacted and a resolution for that interaction.

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** • Genesys Messaging (CE34) **Inbound** • Genesys Call Routing (CE01)	**Self-Service and Automation** • Genesys Chatbots (CE31) • Genesys Voicebots (CE41) **Workforce Engagement** • Genesys Agent Assist (EE31)	None

General Assumptions

Customers and/or Genesys Professional Services are responsible for managing the Copilot NLU, rules engine and uploading their own knowledge base content into Genesys Knowledge Workbench to be used by Agent Copilot.

Customer Responsibilities

Customer needs to provide a KB or the articles that will be the elements of the Knowledge Base.

Document Version

- Version **v 1.0.0** last updated **June 30, 2026**

Genesys Business Communications (OP01) for Genesys Cloud

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:

PureConnect

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 Flow
    - 4.3 Business and Distribution Logic
- 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

Companies want to reduce complexity, simplify administration, improve efficiency, and reduce total cost of ownership. They need a single platform that empowers both contact center and business users. The combination of customer experience management and business communications gives customers a unified all-in-one solution.

Companies no longer want to deal with multiple cobbled-together communications solutions. These solutions require more resources to deploy and maintain, increase cost of ownership, and leave the business constantly context-switching without a good way to collaborate 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 combines a contact center solution with traditional business telephony functionality, speech-enabled auto-attendant, and real-time collaboration features. For example, video conference, screen share, dynamic team chat, presence management, corporate directory, and document management.

In keeping with multi-modality requirements, companies must equip their employees, especially sales force and field organizations, with mobility-based applications that give them the same functionality as their in-office counterparts. This functionality includes a company-wide directory with real-time presence and geolocation indicators, call controls and voicemail, find-me/follow-me, video and voice conferencing, ad hoc call recording, and unified messaging. Employees must also have access to contacts and communications from anywhere, on any device—including native mobile applications. Selecting a unified platform that supports traditional and digital communication capabilities can bridge the gap between the contact center and the rest of the business, and become 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	A single, all-in-one platform approach enables you to better control communications while reducing costs. The Genesys Cloud CX solution centralizes omnichannel processing, system configuration, administration, and reporting, while also consolidating multiple vendors to one. Wizard-driven DIY administration eases time and effort to set up and manage.
Reduced Deployment Costs	The cloud platform provides fast deployment and provisioning through the ability to auto-sync users from your HR record system, and cost-saving WebRTC softphones vs. expensive hardphones.

Use Case Benefits	Explanation
	Continuous deployment enables fixes and features to be rapidly and automatically delivered—without a heavy upgrade process or downtime. A scalable cloud architecture enables simple and cost-effective pricing. Instantly deploy new users as needed, when needed – wherever they're located. The reliable, integrated application suite eliminates unstable voice processing cards and all the points of potential failure that come with multi-system configurations.
Reduced IT Operational Costs	The platform provides cost-effective omnichannel customer service calls, email, chats, text, and social media to handle all types of communications quickly and consistently. The streamlined real-time monitoring and end-to-end reporting capabilities make it easy to ensure service quality across channels. Applications for outbound campaigns and workforce management complete the solution. The platform supports open interoperability and eliminates vendor lock-in to proprietary hardware. Customers can take advantage of the platform to integrate openly with third-party cloud or premises PBX – or just use the built-in features. The platform also integrates easily to databases, web services, messaging platforms, business apps, CRM and ERP packages, and SIP devices. These include gateways, telephones, and headsets. Desk phones are no longer necessary. Users are able to break free of location and hardware restraints and reduce business communications costs with a simple PureCloud Softphone. Users can make and take calls with just a browser and the Internet.

Summary

This use case offers basic PBX functionality, together with rich collaboration features. Features include:

- IP PBX call processing
- Auto-attendant
- Desktop phone features
- WebRTC softphone
- Real-time presence management
- On-demand call recording
- Voice and video conferencing
- Screen- and file-share
- Corporate and workgroup directories
- Instant messaging

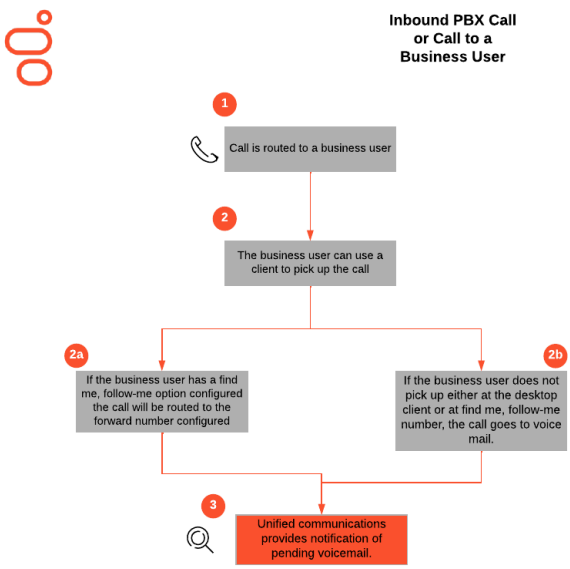
- Voicemail and unified messaging
- Document management
- Multilingual support

This complete functionality is built into the Genesys Cloud CX Communicate license, available as low as $19.99 per user per month (with annual prepay). Genesys Cloud CX Communicate complements the contact center sales: lead with contact center and evaluate back-office opportunity for business users.

Use Case Definition

Business Flow

(1) Inbound PBX Call or Call to a Business User



Business Flow Description Call options provided

1. The call routes to a business user via Direct Inward Dial (DID) *See flow at bottom for Company Directory example.*
2. The business user uses the client to pick up the call.
    1. If the business user has find-me/follow-me configured, the call routes to the configured forward number.
    2. 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 voicemail.
3. Unified communications provide notification of pending voicemail.

ACD user connects to Business user via chat.

1. The ACD user searches Directory to find a SME (based on name, department, title, or skills).
2. The ACD user contacts the back-office SME via chat tool.

ACD user connects to Business user via video.

1. The ACD user searches Directory to find a SME (based on name, department, title, or skills).
2. The ACD user opens an internal video and receives product training via screen share tool.

ACD user connects to Business user via mobile application.

1. The ACD user can still reach Business users in the field via mobile device.

The Company Directory feature allows customers to call an IVR and say the name of the Genesys Cloud CX user they want to reach.

1. Customer contacts a Genesys Cloud CX user that does not have a DID (or they do not know the DID).
2. Customer calls the main IVR no. and says the name of the Genesys Cloud CX user they want to reach.
3. The system automatically connects the caller to the Genesys Cloud CX user.
4. Notes:"https://help.mypurecloud.com/articles/enable-company-directory-support-menus/"

Business Flow

(2)

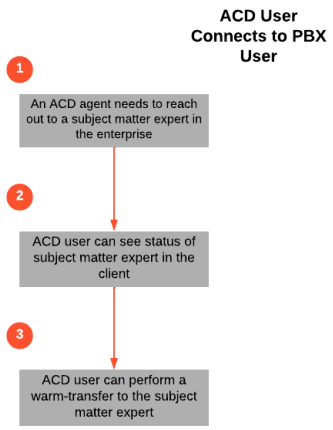
Business and Distribution Logic

Business Logic

There is no applicable content.

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.



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

   1. The ACD agent reaches out to a subject matter expert in the enterprise.

   2. The ACD user sees the status of the subject matter expert in the client.

   3. The ACD user performs 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.

   ACD user connects to business user via chat

1. The ACD agent reaches out to a SME in the enterprise.
2. The ACD agent sees the status of the SME in the client.
3. ACD user reaches out to the back office SME via chat.

   ACD user connects to business user via video

1. The ACD agent reaches out to a SME in the enterprise.
2. The ACD agent sees the status of the SME in the client.
3. ACD user reaches out to back office SME via video.

   ACD user connects to business user via mobile application

1. The ACD agent reaches out to a SME in the enterprise.
2. The ACD agent sees the status of the SME in the client.
3. ACD user can still reach business users in the field via mobile device.

The Company Directory feature allows customers to call an IVR and say the name of the Genesys Cloud CX user they want to reach.

1. Customer contacts a Genesys Cloud CX user that does not have a DID (or they do not know the DID).
2. Customer calls the main IVR # and says the name of the Genesys Cloud CX user they want to reach.
3. The system automatically connects the caller to the Genesys Cloud CX user.
4. Notes: https://help.mypurecloud.com/articles/enable-company-directory-support-menus/.

User Interface & Reporting

Agent UI

See the Genesys Cloud CX Installation and Configuration Guide: https://help.mypurecloud.com/articles/purecloud-apps/.

Web app

Access your Genesys Cloud CX account from almost any computer with the web app. Use a web browser, such as Chrome or Firefox, to log on to Genesys Cloud CX without downloading an app.

Mobile apps

Use the mobile app to stay connected to your org directory and chats, even when you are away from your office. We offer apps for iPhone and Android phones.

Desktop app

Keep Genesys Cloud CX separate from your browser and other work with the desktop app. The desktop app allows you to open Genesys Cloud CX automatically at startup and run it in the background. Download the desktop app for Windows or Mac.

Reporting

Real-time Reporting

Due to the continuous evolution, the features available in Genesys Cloud CX change rapidly. See the Genesys Cloud CX Resource Center for latest features at http://help.mypurecloud.com. The following are examples of Genesys Cloud CX historical and real-time views that provide relevant insights:

Business User Reporting

- Interactions. The Interactions view provides detailed information on both historical and real-time interactions.
- Call Detail Reporting (if leveraging voice from Genesys Telecom). This report tracks your organization's consumption of Genesys Cloud CX Voice services, including information about call origin and destination, and the type of call.

Contact Center Reporting

- Agent

- Agent views provide metrics on agent status, agent performance, agent interactions, and other metrics to understand agent activity. Filters include skills, languages, wrap-up codes, and more.
- Queue
- Various views provide insight into both real-time and historical queue activity.
- The Queue Activity view shows real-time metrics, including all calls that are currently waiting on and interacting with agents.
- Reports
- Genesys Cloud CX has a full library of canned reports available in .pdf and .xlsx formats.
- Supervisors can filter these reports by dates, users, queues, and more.
- Supervisors can download reports from the Genesys Cloud CX user interface.
- Supervisors can schedule reports to run and download in batch.
- Other views include, but are not limited to:
- WFM
- Quality
- Outbound
- Scheduled Callbacks
- Campaigns

Historical Reporting

There is no applicable content.

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	**Open Platform**	None

All of the following required:	At least one of the following required:	Optional	Exceptions
		• Genesys Voice Services (OP04)	

General Assumptions

- The customer is an existing Genesys Cloud CX customer.
- Voice option has been setup and configured under Cloud CX/OP04 Draft Genesys Voice Services (OP04) for Genesys Cloud CX

Customer Responsibilities

There is no applicable content.

Document Version

- Version **V 1.0.1** last updated **June 30, 2026**

Genesys CRM Collaboration (OP02) for Genesys Cloud

> **Important**
> Making routing decisions requires business logic and these details are specific to the implementation. Routing decisions and screen pops depend on the types of information stored in and retrieved from the CRM.

Enhance routing capabilities and drive agent screenpops using Genesys Cloud CX Data Actions

What's the challenge?

CRM information and the contact center traditionally been silo'ed, but they don't have to be. The contact center can leverage integrations to the CRM to provide a superior customer experience and more efficient handling of calls through improved routing decisions and the surfacing of critical context to the agent as the call is delivered to them.

What's the solution?

Using information stored in the CRM regarding your customer and their prior interactions with your business can be used to great effect by the Contact Center. Data enabling your IVR allows for the customer experience to be more personalized, addressing the caller by name and confirming critical information prior to reaching an agent. Lastly, the information gathered from the CRM can be surfaced directly to the agent.

Link to video

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
- 7 Related Documentation
    - 7.1 Document Version

Use Case Overview

Story and Business Context

CRMs and the contact center often coexist, serving as complimentary pieces to the customer experience puzzle. The contact center can use information stored in the CRM about your customer and their prior interactions with your business to provide a more personalized, meaningful, and effective customer experience. Data enables your IVR to make the customer experience more personalized, addressing the caller by name and confirming critical information before they ever reach an agent. This data can also be used to make advanced routing decisions, steering the customer to the appropriate queue to handle their inquiry. Once a queue is chosen, the system selects the appropriate skills an agent in that queue should have to properly handle this inquiry. The system provides the ACD engine all the facets it should consider when making a routing determination. Lastly, the information gathered from the CRM can be surfaced directly to the agent when they receive the call. The agent will have all the necessary context to quickly and efficiently handle the call.

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	Personalize IVR experience and improve routing efficiency creating an improved overall customer experience.
Improved First Contact Resolution	Improved FCR by enabling more intelligent routing.
Reduced Handle Time	Reduced handle times by providing critical interaction context directly to the agent desktop

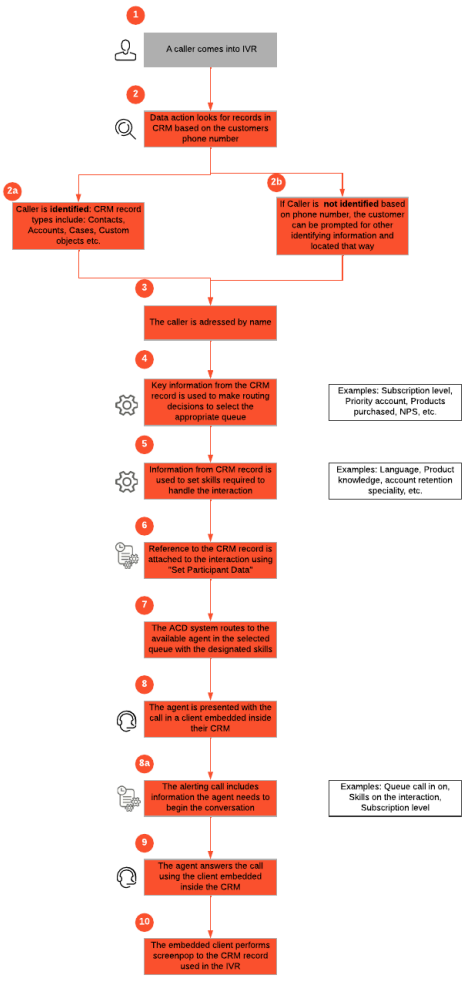
Summary

Genesys Cloud CX supports out of the box integrations for Salesforce, MS Dynamics CRM 365, and Zendesk. Genesys Cloud CX also supports a “generic” integration that connects to a wide range of REST and GRAPH APIs. For more information, see: https://help.mypurecloud.com/articles/requirements-for-the-data-actions-integration (web services tab).

Use Case Definition

Business Flow

Business Flow Description



Business Flow Description

1. Call enters the IVR.
2. Based on the customer's phone number, the data action searches for records in the CRM.
    - 2a Caller is identified. CRM record types can include contacts, accounts, cases, custom objects, etc.
    - 2b Caller is not identified. If the caller is not identified based on phone number, the customer can be prompted for other identifying information to locate the contact.
3. Caller is addressed by name.
4. Key information from the CRM record is used to make routing decisions and select the appropriate queue.
    - Examples: Subscription level, priority account, products purchased, and NPS.
5. Information from CRM record is used to set up to five skills required to handle the interaction.
    - Examples: Language, product knowledge, and account retention specialty.
6. Reference to the CRM record is attached to the interaction using a Set Participant Data action.
7. The ACD system routes to the available agent with the designated skills in the selected queue.
8. Agent is presented with the call in a client embedded inside their CRM.
    - Alerting call includes information the agent needs to begin the conversation.
        - Examples: Queue call in on, skills on the interaction, subscription level.

9. The agent answers call using client embedded inside the CRM.
10. The embedded client performs screenpop to the CRM record used in the IVR.

Business and Distribution Logic

Business Logic

Distribution Logic

- Install the data action integration relevant to your CRM:
  - https://help.mypurecloud.com/articles/add-a-data-actions-integration/
- Configure and test your data actions:
  - https://help.mypurecloud.com/articles/create-custom-action-integrations/
  - https://help.mypurecloud.com/?p=141929
- Add the data action to your call flow:
  - https://help.mypurecloud.com/articles/use-data-actions-for-integrations/
- Install the CRM integration from AppFoundry:
  - https://appfoundry.genesys.com/#/filter/purecloud

User Interface & Reporting

Agent UI

There are two methods to deliver a screen pop, either use an agent script or agent UI embedded into the CRM.

Reporting

Real-time Reporting

There is no applicable content.

Historical Reporting

There is no applicable content.

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

Customer Responsibilities

- Customer has a CRM.
- Assumes CRM has web service endpoints to access records.
- Assumes they are not using sensitive data to make routing decisions.

Related Documentation

Document Version

- Version **V 1.0.2** last updated **June 30, 2026**

Genesys Voice Services (OP04) for Genesys Cloud

Telephony Connection Options

What's the challenge?

While new communication channels continue to crop up, the importance of voice remains. But physical hardware and network maintenance can be cumbersome and doesn't scale well. Meanwhile, your business is growing and today's needs may not be the same as next year's needs.

What's the solution?

A wide variety of voice services connectivity options can provide ultimate flexibility and choice—so whether you want to use the same vendor for your contact center solution and voice services, or you prefer to bring your own carrier and manage your own costs, you're able to keep up with your business' shifting needs, all while extending cloud benefits across the business to provide speed, stability and agility.

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 Flow
  - 4.3 Business Flow
  - 4.4 Business Flow
  - 4.5 Business Flow

    - 4.6 Business Flow
    - 4.7 Business Flow
    - 4.8 Business Flow
    - 4.9 Business and Distribution Logic
- 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

While new communication channels continue to crop up, the importance of voice remains. The speed and agility of the Genesys™ Genesys Cloud CX™ contact center platform connects your customer engagement and enterprise-wide unified communications with the telephony option that best fits your business needs. The widest variety of voice services connectivity options in the industry gives customers unparalleled flexibility and choice. Customers can choose Genesys Cloud CX Voice (Genesys telecom) for VoIP, use the cloud-based Bring Your Own Carrier (BYOC) option, or BYOC on-premises using a Genesys Cloud CX Edge appliance for local survivability. Customers can keep a carrier contract or existing PBX infrastructure, or consolidate using Genesys as a single vendor for all needs. Customers who choose Genesys Cloud CX are often attracted to the cloud technologies and microservices architecture that provide speed, stability, and agility for their business. Adopting a cloud solution for voice services is a future-proof approach—extending these same cloud benefits across a customer's entire communications system.

Genesys Cloud CX Voice

Genesys Cloud CX Voice is an internet-based telephony service provided by Genesys that, when activated, provides public telephony access to Genesys Cloud CX services. (for example, Genesys Cloud CX Communicate and Genesys Cloud CX contact center.) The Genesys Cloud CX Voice service is built on Genesys Telecom, a Genesys second-generation multi-carrier platform, and registered Interconnected-VoIP provider, subject to all local telecom regulation. With Genesys Cloud CX Voice, customers can simplify their software and vendor management, consolidating down to one vendor and one bill. Deployment is fast with this all-cloud solution that easily scales. After enabling Genesys Cloud CX Voice for an organization, the administrator can purchase new phone numbers (for example, 800 numbers and DIDs) from a Genesys Cloud CX-provided inventory. Alternatively, they can also port existing phone numbers to the service for use with Genesys Cloud CX. From there, administrators can assign phone numbers to users, IVR systems, managed phones, or campaigns. Pricing is based per phone number and usage-per-minute.

Bring Your Own Carrier (BYOC).

Genesys Cloud CX BYOC refers to the ability for customers to define SIP trunks between Genesys Cloud CX and third-party devices or services. Customers can establish and maintain strategic carrier relationships and manage their own business voice costs. This service also eases deployment of global offices by enabling compliance with country-by-country telephony regulations. This service also allows customers to apply the speed, scalability, and agility of the cloud. A premises-based appliance is also available for customers who want local survivability. BYOC is available in two distinct offerings, named according to where the connection terminates against Genesys Cloud CX: BYOC Cloud: Customers can define SIP trunks between the Genesys Cloud CX cloud-based Edge & Media Tier and third-party systems over the public Internet. BYOC Premises: Customers can define SIP trunks between premises-based Edge hardware devices and third-party systems. Whether customers use BYOC in the cloud or a local Edge appliance, the solution enables them to create efficient and cost-effective telephony plans by applying local carriers and defining outbound routes for various number classifications.

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	Easily purchase and provision new phone numbers directly within an intuitive administrative interface.
Reduced Deployment Costs	Take advantage of an all-cloud solution for voice services—can be deployed in days, with no hardware required.
Reduced IT Operational Costs	With a zero-hardware footprint, IT teams can realize a reduction in communications hardware and network maintenance.

Summary

Genesys Cloud CX telephony connection options provide convenience and flexibility. Simplify your implementation by using Genesys Cloud CX Voice, a comprehensive contact center solution that includes telephony service provided by Genesys. For more interoperability between Genesys Cloud CX and third-party devices, or to retain your existing carrier service, choose a Bring Your Own Carrier (BYOC) option.

Additional information can be found in these documents:

- https://help.mypurecloud.com/articles/telephony-connection-options
- https://www.genesys.com/capabilities/voice-services

Use Case Definition

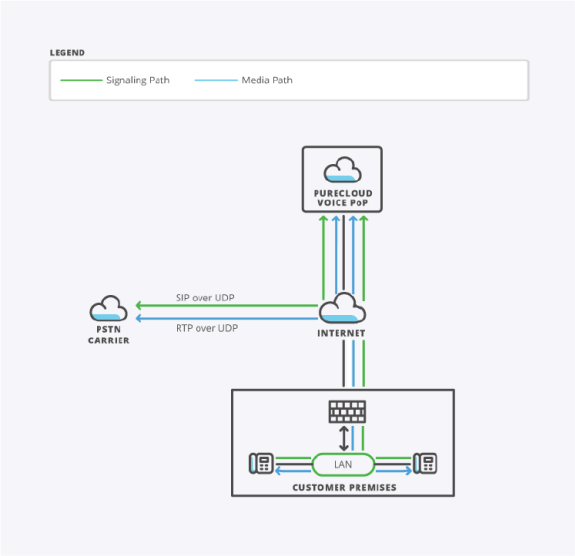
Business Flow

How does Genesys Cloud CX Voice work?

After an organization enables Genesys Cloud CX Voice, the Genesys Cloud CX Voice administrator purchases new phone numbers or ports current phone numbers to the service. They can then assign phone numbers to users, IVRs, managed phones, or campaigns.

When you use Genesys Cloud CX Voice with a phone, it securely connects over the public Internet to the nearest available Genesys Cloud CX Voice region. After the phone connects to the Genesys Cloud CX Voice region, the phone authenticates and registers with the customer’s Genesys Cloud CX services. TLS encryption secures the communications between the phone and Genesys Cloud CX Voice service.

For more information, see https://help.mypurecloud.com/articles/how-does-purecloud-voice-work/.



Business Flow Description

1. Our customer's customer calls an 800 number for sales or support assistance.

- Our customer purchases a toll-free (1-800-xxx-xxxx) number from a carrier of choice.
- Anyone can call this 800 number from a mobile device or landline and reach our customer via the PSTN.

1. PSTN routes the call to the appropriate cloud carrier that is registered to the 800 number.
2. The cloud carrier connects to Genesys Cloud CX Media Tier & Trunking Services over the Internet.
3. The call connects to a Genesys Cloud CX ACD or business user via the Internet.

Business Flow

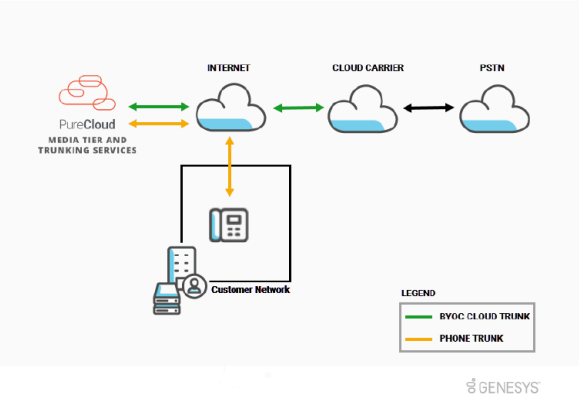
BYOC Cloud solutions

With Genesys Cloud CX's BYOC Cloud solution, you can choose one of two methods to implement either your Carrier connection or your PBX connection.

- Configure BYOC Cloud by means of a cloud-based carrier device or a premises-based carrier device.
- Configure BYOC Cloud by means of a cloud-based PBX device or a premises-based PBX device.

The following diagrams illustrate each of these options. For more information, see https://help.mypurecloud.com/articles/byoc-cloud-solutions/.

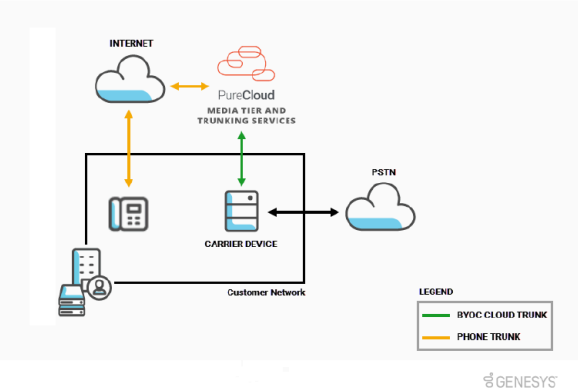
A Cloud-Based Carrier Device



Business Flow Description

Business Flow

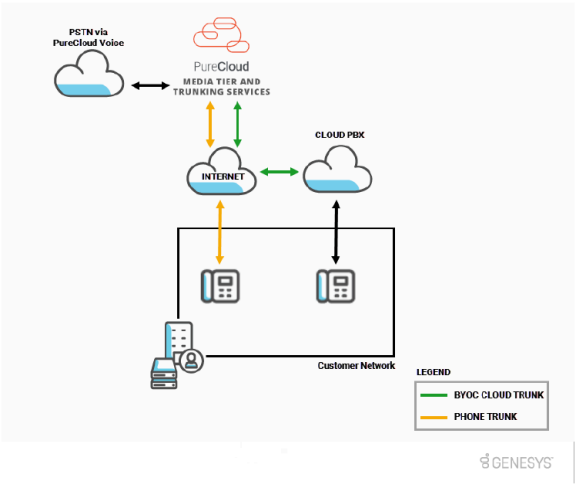
A Premises-based Carrier Device



Business Flow Description

Business Flow

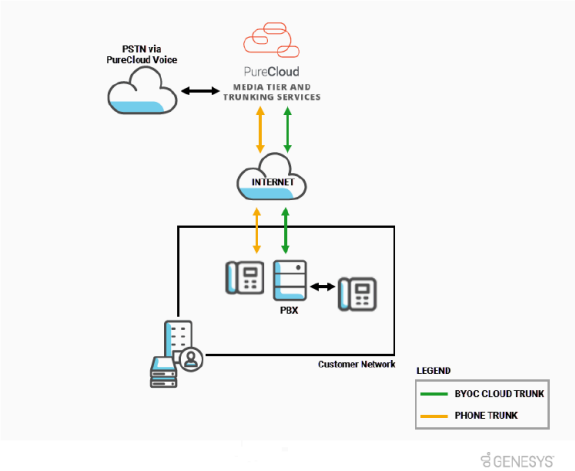
A Cloud-based PBX Device



Business Flow Description

Business Flow

A Premises-based PBX Device



Business Flow Description

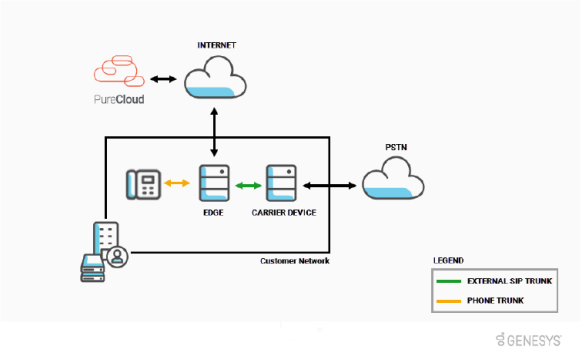
Business Flow

BYOC premises solutions

With Genesys Cloud CX's BYOC premises solution, configure SIP trunks between your premises-based Edge appliances and a third-party carrier using one of two methods. Use a premises-based carrier device or use a cloud-based carrier device. The following diagrams illustrate both options.

A premises-based carrier device

Configure a SIP trunk that connects your on-premises Edge to an on premises carrier device. For more information, see https://help.mypurecloud.com/articles/byoc-premises-solutions.

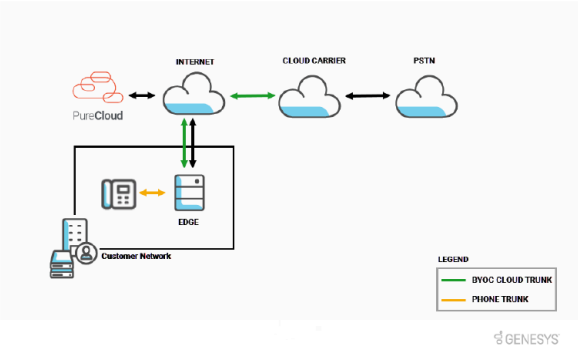


Business Flow Description

Business Flow

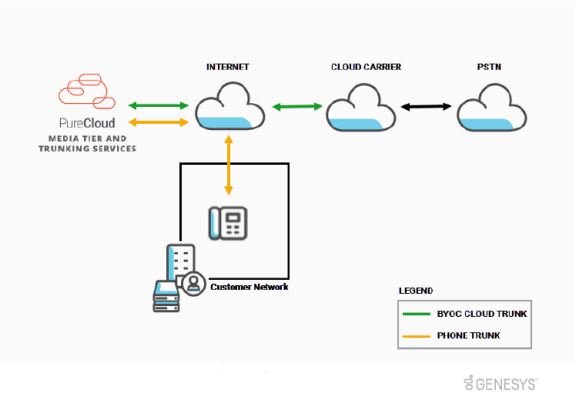
A Cloud-Based carrier Device

Configure a SIP trunk that connects your on-premises Edge to a carrier device in the cloud.



Business Flow Description

Business Flow



Business Flow Description

Business and Distribution Logic

Business Logic

All voice calls to external participants route through a Genesys Voice Solution: Genesys Cloud CX Voice or Bring Your Own Carrier.

- Does the customer have an existing carrier relationship?
- Does the customer want to keep this existing carrier relationship or port services to Genesys Cloud CX Voice?

The first example uses a toll-free 800 number. The number in this example can also be interchanged with the DID number. For example, any number reachable from the PSTN.

Example 1

- Customer has an existing relationship with Carrier ABC that owns their 800 numbers.
- Customer selects BYOC open and integrates our solution with Carrier ABC for PSTN services.

Example 2

- Customer does not have an existing relationship with any carriers and needs to buy net-new 800 numbers.
- Customer selects Genesys Cloud CX Voice and purchases new 800 numbers from within our platform.

Example 3

- Customer has an existing carrier relationship with Carrier ABC that owns their 800 numbers. Customer wants to consolidate and sees efficiencies in porting these numbers to Genesys Cloud CX Voice.
- Customer selects Genesys Cloud CX Voice and completes the necessary paperwork to transfer or port services from their previous carrier to Genesys Cloud CX Voice. For 800 numbers, this process is referred to 'resporg'. It updates the PSTN so that it knows what carrier to route the traffic to. In this example, PSTN has to be notified that the 800 number is now registered to Genesys Cloud CX Voice.

Distribution Logic

All voice calls to external participants route through a Genesys Voice Solution: Genesys Cloud CX Voice or Bring Your Own Carrier.

The Number Plan / Number Assignment configuration defines all distribution logic of calls to business users or agents. Customers can assign a phone number to a user or to an IVR with ACD Routing. For more information about distribution logic after routing the number per number assignment, please refer to Genesys Business Communications or Genesys Call Routing use cases.

- Business users: To assign a DID, see https://help.mypurecloud.com/articles/number-assignments/.

- IVR: To assign a toll-free or DID, see https://help.mypurecloud.com/articles/beta-add-a-call-route/.

User Interface & Reporting

Agent UI

There is no applicable content.

Reporting

Real-time Reporting

Genesys Cloud CX provides real-time reporting for managers, supervisors, and agents. Real-time reporting includes contact center performance and metrics in dynamic views and dashboards. For more information about real-time reporting for your business requirements, see About reports, views, and dashboards.

Views

Real-time reporting dynamic views display historical and real-time contact center metrics for interactions, agents, and queues. Use these views to meet your business needs.

To view in-progress and completed interactions, see Interactions view. The interaction's details page shows the interaction overview that is a visual representation of the interaction. The interaction overview provides information about the interaction participants and the type of interaction, including a waveform for voice interactions.

Agents Performance views include agent metrics, time in statuses, and evaluations. To understand agent activity, view detailed performance metrics for an agent or group of agents, in the Agents Performance Detail view.

Queues views provide insight into both real-time and historical queue performance data, including queue activity and metrics. See real-time information about a specific queue in the Queues Activity Detail view, including the queue's current interactions, agents, and service levels in one view. The Queues Activity Summary view updates in real time, and shows real-time statistics for all queues at the same time.

Dashboards

Performance Dashboards allow you to monitor the real-time activity for the contact center. These include service level, ASA, and the number of customers interacting and waiting. Display selected metrics and performance data about your contact center by creating Dashboards. With the Metric and Chart widgets, you can select the metrics about the queues, users, wrap-up codes, flows, or flow outcomes you want to see on your dashboards.

Historical Reporting

Reports show you historical data about your contact center and assist you in understanding your business needs. Use reports to see past metrics and data about the contact center. Reports include a pre-defined set of metrics. You set parameters for reports such as which users or queues to include, which media types to include, what date range to report on, and when to run the report. You can schedule reports to run at certain times, and you can run the report directly from your reports list page.

Using historical reports with dashboards and views gives you an accurate picture of your contact center's performance.

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

All voice calls to external participants route through a Genesys Voice solution: Genesys Cloud CX Voice or Bring Your Own Carrier.

For a list of countries in which Genesys Cloud CX Voice is currently available, see https://help.mypurecloud.com/articles/purecloud-voice-global-coverage-2/ .

BYOC Cloud is available in all regions where Genesys Cloud CX is available. To view BYOC Cloud requirements, see https://help.mypurecloud.com/articles/carrier-requirements-byoc-cloud/ .

For more information about how BYOC Premises is defined, see https://help.mypurecloud.com/articles/byoc-premises-solutions/ .

Customer Responsibilities

There is no applicable content.

Document Version

- Version **V 1.0.1** last updated **June 30, 2026**

Genesys UCC Third-Party Integration (OP07) for Genesys Cloud

Enable customer choice of unified communication providers and telephony solutions through integrations with popular platforms.

What's the challenge?

Agents work in many different, disconnected systems. Each toggle or change in device adds more time and more friction in the employee experience.

What's the solution?

A single user experience that brings together the contact center and the back-office. From within Genesys Cloud CX, agents can search the organization directory, view contact information and status of users, click-to-call or warm transfer if need be.

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 **Genesys Cloud CX BYOC-Cloud + MS Teams (Cloud)**
  - 4.3 Business Flow
  - 4.4 **Genesys Cloud CX BYOC-Cloud + Zoom Phone**
  - 4.5 Business and Distribution Logic
- 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

You can benefit from the productivity and communication capabilities of Genesys Cloud CX and collaboration tools such as Microsoft Teams and Zoom that make it easier for contact center agents to collaborate and communicate with subject matter experts across the company and resolve issues within the first customer contact. Benefit from the flexibility of the Genesys Cloud CX™ platform and the productivity and supported communication capabilities. You can make it easier for contact center agents to collaborate and communicate with subject matter experts across the company and deliver memorable customer experiences.

Agents use the integrated directory, search, and presence features to find a subject matter expert, determine availability and collaborate in real time with a single click. A single communication and collaboration interface for agents puts an end to switching between systems. Real-time access to experts gives them the ability to resolve issues within the first contact. Select from Microsoft, Genesys, or another carrier of your choice for inbound and outbound voice and your internal calls.

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	Makes it easy for contact center agents to collaborate and communicate with subject matter experts across the company in real-time to help address customer inquiries more efficiently.
Improved Employee Productivity	Reduces the friction in the agent experience while helping them to be more efficient, engaged, and productive.
Improved First Contact Resolution	Improve first contact resolution, drive personalized experiences, and build customer loyalty by empowering agents with the expertise of the entire organization.

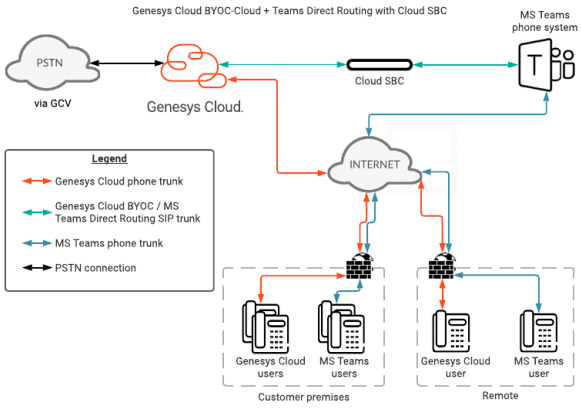
Summary

Improve the quality of work and productivity by empowering agents with a single integrated communication and collaboration interface. Real-time access to experts gives them the ability to resolve customer issues within the first contact. Select from Microsoft, Genesys, or another carrier of your choice for inbound and outbound voice and your internal calls. It’s a convenient combination with the industry-leading Genesys Cloud CX routing and artificial intelligence capabilities — with a single point of control.

Use Case Definition

Business Flow

MS Teams (Calling Plans) + Genesys Cloud CX PCV + MS Teams (Cloud) w/ Cloud SBC



Business Flow Description

Genesys Cloud CX BYOC-Cloud + MS Teams (Cloud)

Use Case: Genesys Cloud CX inbound call transfer to MS Teams Remote User

- Inbound call from PSTN to Genesys Cloud CX IVR
- Genesys Cloud CX IVR flow initiates call transfer to MS Teams Phone System (Cloud) User DID
- Genesys Cloud CX Dial Plan routes call through Genesys Cloud CX BYOC-Cloud Trunk to MS Teams Phone System (Cloud)
- MS Teams Phone System (Cloud) initiates call transfer to MS Teams Remote User
- MS Teams Phone System (Cloud) routes call through MS Teams Phone Trunk to MS Teams Remote User

MS Teams Remote User warm transfer* call to Genesys Cloud CX User

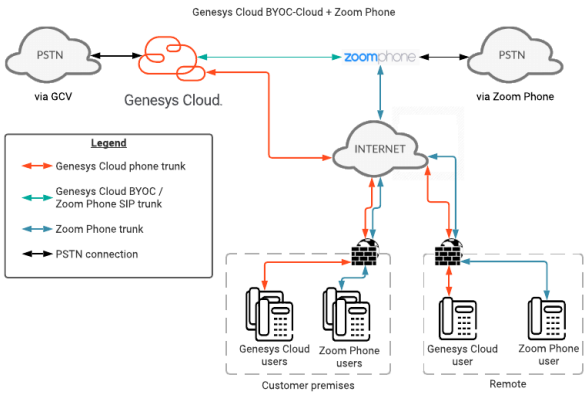
- MS Teams Remote User initiates warm transfer to Genesys Cloud CX User DID
- MS Teams Phone System (Cloud) initiates call through MS Teams Direct Routing Trunk to Genesys Cloud CX
- MS Teams 'Dial Plan' routes call through MS Teams Direct Routing Trunk to Genesys Cloud CX
- Genesys Cloud CX initiates call transfer to Genesys Cloud CX User
- Genesys Cloud CX routes call through Genesys Cloud CX Phone Trunk to Genesys

Cloud CX User

- MS Teams user disconnects from call

Business Flow

Genesys Cloud CX BYOC-Cloud Carrier + Zoom Phone Carrier and PBX



Business Flow Description

Genesys Cloud CX BYOC-Cloud + Zoom Phone

Use Case: Zoom Phone inbound call transfer to Genesys Cloud CX IVR

- Inbound call from PSTN to Zoom Phone IVR
- Zoom Phone Integration initiates call transfer to Genesys Cloud CX
- Zoom Phone routes call through Genesys Cloud CX BYOC-Cloud Trunk to Genesys Cloud CX IVR
- PSTN caller hears Genesys Cloud CX IVR and selects from available options
- Genesys Cloud CX IVR routes call to correct entity (user, group, queue, etc.)

Genesys Cloud CX User warm transfers* call to Zoom Phone User

- Genesys Cloud CX User initiates warm transfer to Zoom Phone User
- Genesys Cloud CX initiates call Genesys Cloud CX BYOC-Cloud Trunk to Zoom Phone
- Genesys Cloud CX 'Dial Plan' routes call through Genesys Cloud CX BYOC-Cloud trunk to Zoom Phone
- Zoom Phone initiates call transfer to Zoom Phone User
- Zoom Phone routes call through Zoom

Phone Trunk to Zoom Phone User

- Genesys Cloud CX User disconnects from call

Business and Distribution Logic

Business Logic

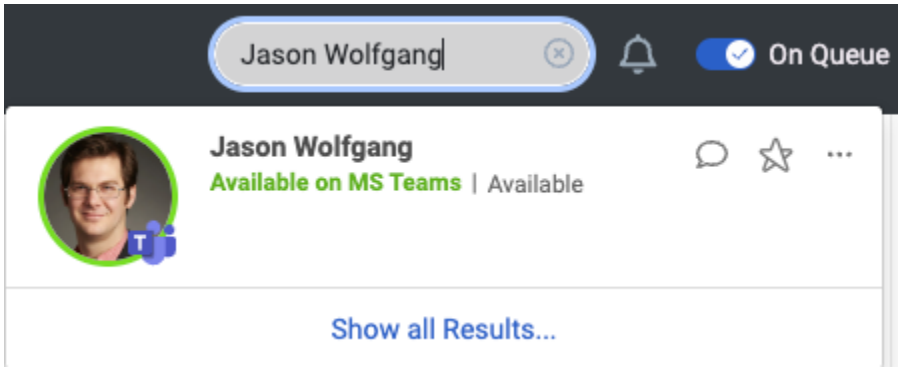
User Interface & Reporting

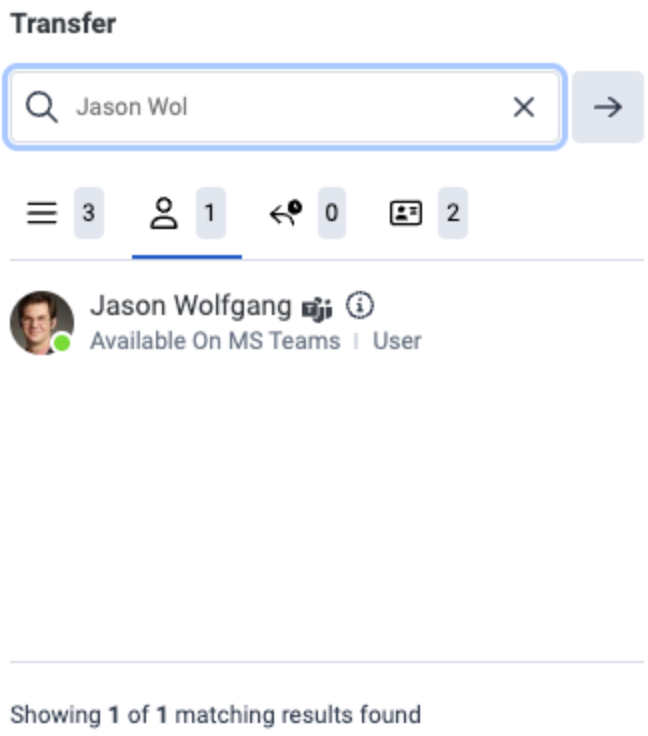
Agent UI

Agents handling voice interactions are able to see a new 'tab' associated with the UC integration (Teams, Zoom, other). Within this tab, UC integration users' presence from external platform is shown and telephone number associated with external platform is used when transferring calls. Please also see the below links for more information on MS Teams integration and Zoom Phone integration:

https://help.mypurecloud.com/articles/about-the-microsoft-teams-integration/

https://help.mypurecloud.com/articles/about-the-zoom-phone-integration/





Reporting

Real-time Reporting

N/A

Historical Reporting

UC Integrations utilize Genesys Cloud CX's BYOC-Cloud and Premises* solutions for voice connectivity to external UC platforms which natively support information about call events, including call transfer and conclusion.

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
Open Platform • Genesys Voice Services (OP04)			

General Assumptions

SIP connectivity between Genesys Cloud CX and the external platform via either BYOC-Cloud or BYOC-Premises.

Customer Responsibilities

Customer is responsible for selecting a SCIM provider and managing SCIM implementation for their Genesys Cloud CX organization. Customer is responsible for setting up SIP connections and managing any additional system components such as SBCs and/or Edges as required by external service provider.

Document Version

- Version **1.0.1** last updated **June 30, 2026**

Quality Assurance and Compliance (WE01) for Genesys Cloud

Improve quality of agent handling of interactions by deriving insights from interaction recording along with recorded desktop activity, quality evaluations, speech & text analytics and post-interaction survey.

What's the challenge?

Contact centers are required to record & retain customer interactions across channels. They also need to record agent desktop activity during interactions to meet compliance requirements and gain insights on Agent performance. Contact centers need an easy to use interface for evaluating the quality of specific interactions and an integrated survey solution to identify opportunities for improvement.

What's the solution?

Genesys Cloud CX records and retains all customer interactions, to meet regulatory requirements. Recording the agent desktop activity provides insight on agent effectiveness in addressing customer needs. Genesys Quality Evaluation includes evaluation forms for use with recorded interactions. Voice transcription enables Speech to text conversion of voice recordings. Post-interaction Survey is built in to the platform. These integrated Quality tools helps improve the Quality of the Contact center.

Link to video

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 Flow
- 4.3 Business Flow
- 4.4 Business Flow
- 4.5 Business Flow
- 4.6 Business Flow
- 4.7 Business Flow
- 4.8 Business Flow
- 4.9 Business and Distribution Logic

- 5 User Interface & Reporting
  - 5.1 Agent UI
  - 5.2 Reporting
- 6 Customer-facing Considerations
  - 6.1 Interdependencies
- 7 Related Documentation
  - 7.1 Genesys Catalog WEM
  - 7.2 Document Version

Use Case Overview

Story and Business Context

The success of a contact center hinges on its ability to provide a high-quality experience to customers, achieve consistently high levels of quality and meet regulatory compliance. Further, Quality evaluators, Quality administrators, and Quality managers need efficient tools and integrated automated processes to ensure that all interactions are handled effectively and efficiently. Hence, Contact centers need systems that provide the functionalities to monitor, record, and evaluate the quality of agent customer interactions on all communication channels combined with recorded agent desktop activity. Further, the system should also have features to obtain customer satisfaction feedback through surveys upon the conclusion of their interaction with the contact center.

Businesses must evaluate the quality of their interactions to identify opportunities for improvement, but it’s not efficient to evaluate every interaction. There is a need to distinguish important from routine interactions and generate the results in a consistent and automated manner. Also company's need to prevent risk arising out of lack of compliance and loss of valuable information.

Genesys Cloud CX™ Quality Assurance and Compliance consists of Integrated tools that help customers meet the above challenges. Genesys Cloud CX Interaction recording reliably records all voice and digital interactions and makes it easy to search and access recordings. Genesys Multi-monitor screen recording captures the agent desktop activity for up to four monitors while handling ACD interactions.

Genesys Cloud CX Speech and text analytics is a set of features that provide automated speech and text analytics capabilities on all interactions to provide deep insight into customer-agent conversations. For voice interaction, speech and text analytics provides automated transcription and employs speech-to-phrase grammar-based recognition. Along with non-linguistic analysis of recordings, speech and text analytics creates meaning from otherwise unstructured data. Sentiment analysis and Topic spotting enable Quality Managers to understand the overall sentiment of the interaction.

Genesys Cloud CX Quality Evaluation features includes flexible evaluation forms for use with any recorded interaction. The evaluation workflow provides both automated and ad hoc assignments, easy access to results and scheduling for ad hoc coaching. Quality Evaluation results enable contact centers to analyze performance for continuous agent improvement and improved customer experience.

Genesys Cloud CX's survey is built in to the platform and is used to send a survey to customers after any media interaction i.e. call, email, chat, and messaging. The survey includes an easy to use flexible form builder with multiple question types for a standard post-interaction satisfaction survey or a post-interaction NPS survey. Genesys sends the survey to the customer via email with a web link to the survey. Geneys Cloud built in survey solutions allows organizations to gain insight into customer satisfaction/experience regardless of the channel and other related contact center metrics.

Organizations can use Genesys Cloud CX Quality Evaluation and Compliance tools to fulfill key use cases around agent performance improvement (decrease AHT, increase FCR, sales conversion, compliance, and customer satisfaction). These precise tools help improve employee culture, technology, and operations to plan and execute strategies that bring contact center quality to new heights.

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	Improve the efficiency of agents with insights from recordings, survey, and quality assessments to enable systematic improvement of NPS.
Improved Employee Productivity	Take advantage of the Quality evaluation criteria to create targeted evaluations to identify the keys to successful sales and improve agent productivity
Improved First Contact Resolution	Leverage the Quality evaluation results and Post interaction survey results to identify and address the root cause(s) of repeat contacts thereby improving FCRs.
Improved Insights and Visibility	Use recordings of interactions and agent desktop, the quality evaluation process and post-interaction survey results to gain insight into quality, process, and procedural improvements.
Reduced IT Operational Costs	Lower total cost of ownership by eliminating the need to purchase additional hardware, software and the associated maintenance and support services through an integrated approach with GenesysCloud

Summary

Genesys Cloud CX's Quality Assurance and Compliance is a set of tools and automated processes that are built to help contact centers ensure that interactions are handled effectively and efficiently.

Organizations must evaluate and improve the quality of the interactions that their employees have with their customers and prospects. The Quality Management module helps organizations improve the quality and efficiency of agent performance which can improve customer satisfaction.

This use case includes overall multichannel (voice and digital) capabilities for interaction recording, agent desktop screen recording (multi monitor), interaction quality evaluation, ad hoc coaching, and post-interaction surveys. These key capabilities provide an effective method for defining desired agent behaviors, acknowledging and reinforcing those behaviors and identifying areas of performance improvement. These features also allow customers to verify that their agents are adhering to critical regulation and compliance.

Genesys Cloud CX Quality Assurance and Compliance provides visibility on the agent activity to understand:

- Why certain types of interactions (voice or digital) take longer to handle than others
- How well the agent understands the applications and processes
- Identify which issues are related to agent problems and which to system/ workflow issues
- Agent's handling of multiple overlapping interactions

- Agent access to unauthorized activity
- Adherence to compliance requirements/regulations
- Impact to customer satisfaction

Use Case Definition

Business Flow

(1) Overall Quality Evaluation and Compliance Process flow

Business Flow

(2) Voice and Digital Recording

Quality Management uses policies to manage all ACD recordings. Policies define the criteria that Genesys Cloud CX uses to determine which interaction recordings to retain, archive, delete, export, initiate screen recording, assign for evaluation, and/or calibration, and initiate surveys.

Business Flow

(3) Screen Recording

Business Flow

(4) Quality Evaluation

Business Flow

(5) Post Interaction Survey

Business Flow

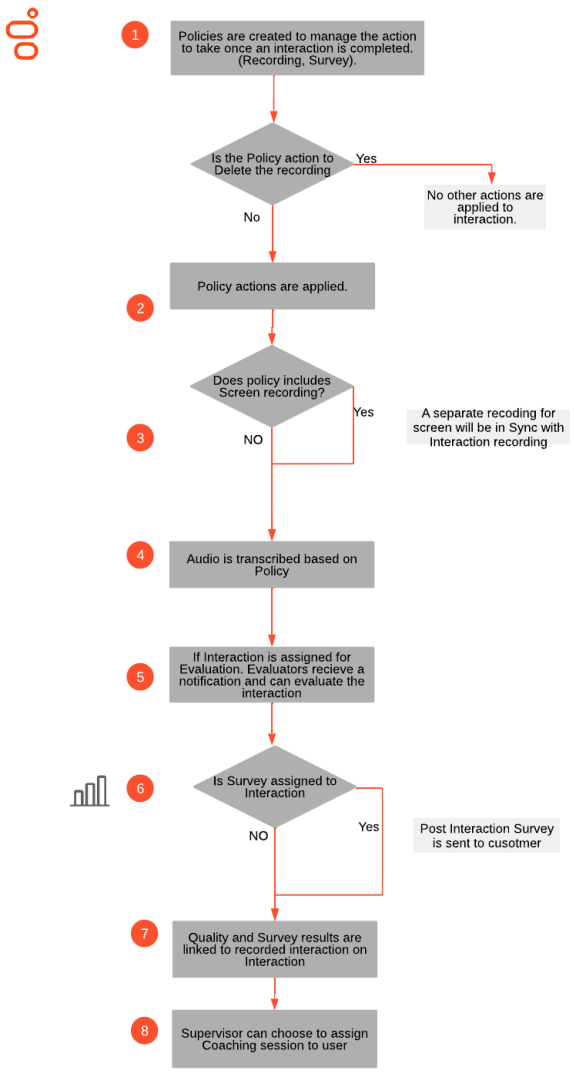
(6) Speech and Text Analytics

Business Flow

(7) Programs and Topics

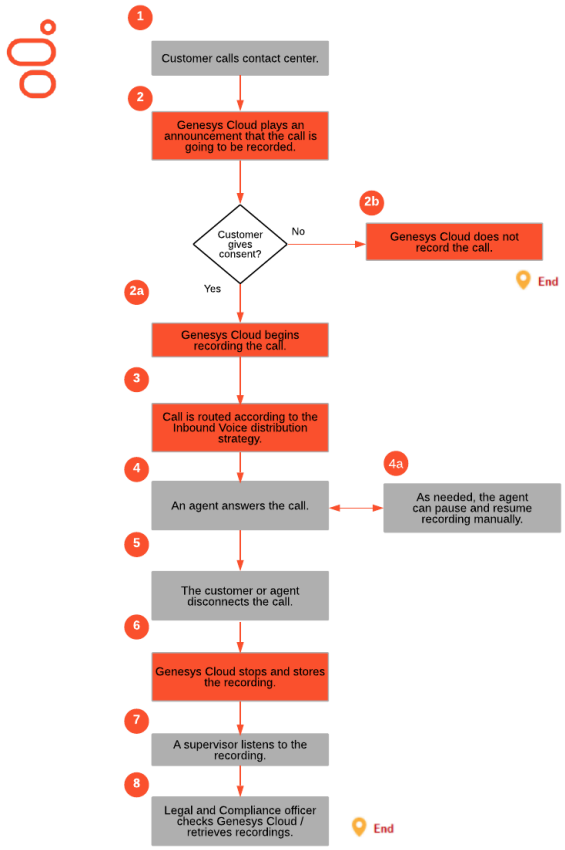
Business Flow

(8) Content Search



Business Flow Description This process flow provides a overview of the complete process of the Quality Management, Recording and STA.

1. Policies are created to manage the action to be taken on interactions. These actions include delete, retain, archive, export of an interaction recording. Policy actions can also include initiate screen recording, assign for evaluation or calibration, initiate a customer survey,
    1. If the Policy action is to Delete the recording - no other actions can be applied to the interaction.
2. If the policy action is to retain recording then an interaction is recorded and stored
3. If policy includes Screen recording - a separate recording for screen activity is available and plays in sync with the interaction recording.
4. If transcription is enabled then interaction is transcribed into text.
5. If the interaction is assigned for evaluation - Evaluators receive a notice of assigned evaluations/ calibrations
    1. Evaluator completes and releases the evaluation
        1. If assigned for agent evaluation - agent receives a notice when there is completed evaluation available for them to review and optionally comment. Agents can view all of their evaluations through Performance > My Performance > Evaluations.
        2. Supervisors can view performance of their agents through Performance > Agents > Evaluations tab.
        3. If assigned for Calibration - Evaluators receive notice of assigned Calibration. Evaluators complete the calibration
        4. Quality Administrator accesses results to compare scoring variations between evaluators
6. If the policy is assigned to send a survey for



an interaction then customer receives survey invitation via email with the survey link. Customer feedbacks from the surveys will be linked to the interaction

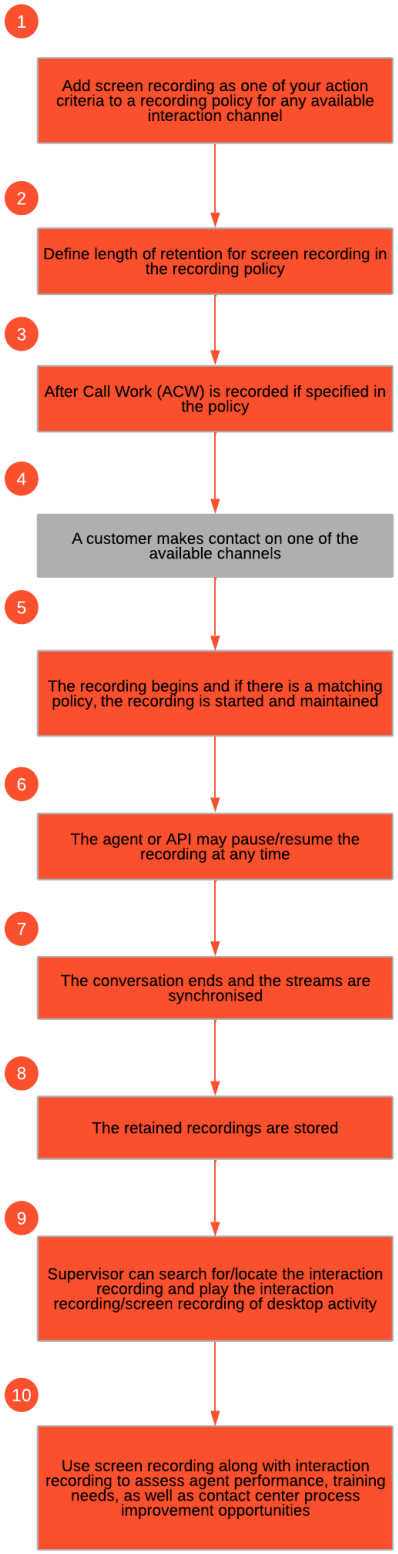
7. Quality and Survey results are linked to recorded interaction and viewed on Interaction Detail. Summary result views provide scoring results and can export for reporting needs.
8. Supervisor/ Evaluator schedules Agent Coaching session Refer to Use Case WE03.

Business Flow Description

1. Customer contacts one of the service lines of the company.
2. For Voice channel, Genesys Cloud CX IVR (Optionally) plays an announcement that the call is going to be recorded.
    1. If Configured for Consent Option - The customer chooses whether to give consent to the recording. For more information about enabling participant recording, see About recording in Genesys Cloud CX and Enable line recording.
        1. If the customer gives consent, Genesys Cloud CX will record the call.
        2. If the customer does not give consent, Genesys Cloud CX does not start recording the call.
3. Voice -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. For more information, see . The Inbound Voice routing strategy is not within the scope of this use case.
    1. For all Digital routing information, visit the Digital use cases. The routing strategy for chat, email, and messaging is not within the scope of this use case.
4. Agent answers the call from any desk within the site.
    1. The agent may (if enabled) pause or resume the recording manually via the

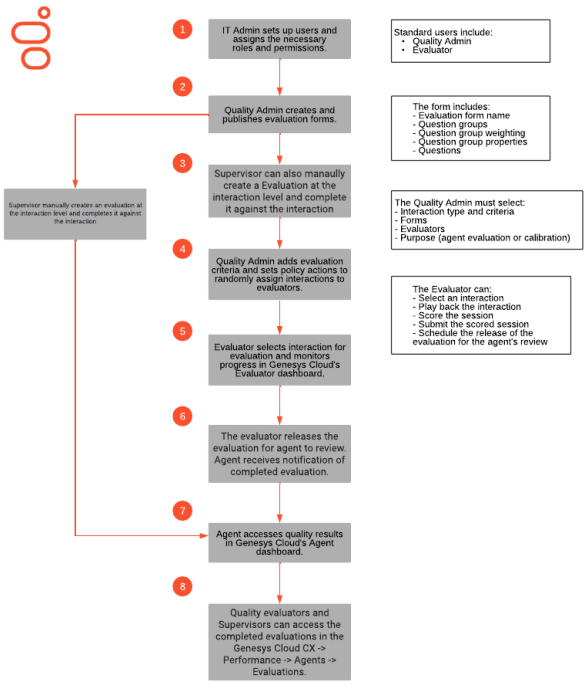
standard script ability when the agent needs to enter sensitive data.

5. Customer or Agent disconnects the interaction.
6. Genesys Cloud stops and stores the recording. Recordings are available for use in the Quality Evaluation, Calibration, and Survey Process.
7. A supervisor listens to the recording.
8. Legal and Compliance officer checks Genesys Cloud / retrieves recordings.



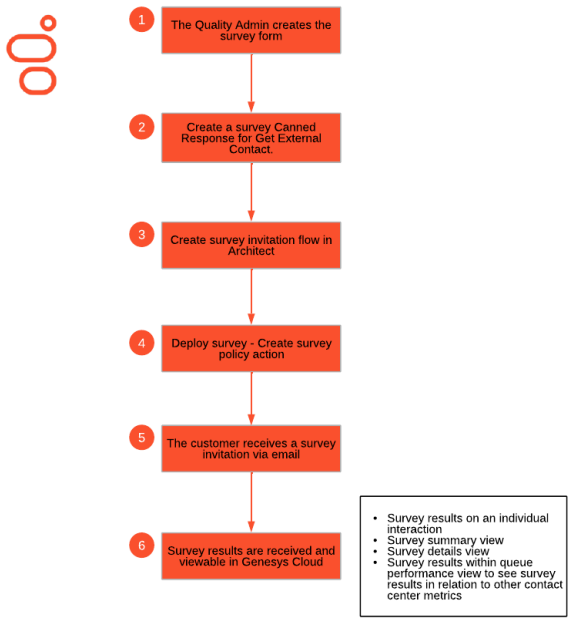
Business Flow Description

1. Add screen recording to a recording policy as one of your actions for any available interaction channel.
2. In the recording policy, define the length of retention for screen recording.
3. if the policy specifies that ACW (After call work) should be recorded then ACW is recorded.
4. The customer makes contact on one of the available interaction channels.
5. The recording begins. If a matching policy exists, recording begins and is retained.
6. The agent or API can pause or resume recording.
7. The conversation ends and streams are synchronized.
8. The retained recordings are stored.
9. The supervisor can search for or locate the interaction recording and play it, along with the screen recording of the desktop activity.
10. Use screen recording along with interaction recording to assess agent performance, training needs, and contact center process improvement opportunities.



Business Flow Description

1. Set up users. Genesys Cloud CX administrator sets up user roles and a related set of permissions. Standard users include:
    - Quality Admin
    - Evaluator
2. The Quality admin creates evaluation forms to define key elements of agent behaviors needed to meet contact center business and customer requirements. The form includes:
    - Evaluation form name
    - Question groups
    - Question group weighting (default is even weighting – weights can be adjusted and will always auto balance to equal 100%)
    - Question group properties (NA enabled, default to highest scoring or NA)
    - Questions
        - Question types (template, multiple choices, range, yes/no)
        - Addition of Evaluation assistance conditions
        - Question properties (NA enabled, critical and/or fatal, visibility conditions, comments required)
        - Question Value (numeric whole numbers)
    - Quality admin selects form to publish to make it available for use in assigning evaluations.
3. Supervisor can also manaully create a Evaluation at the interaction level and complete it against the interaction.
4. Evaluation/Calibration Planning. The Quality admin adds evaluation criteria to recording policies for contact center agent groups or individual agents. The Quality admin sets policy actions to assign interactions randomly to evaluators, including criteria such as number of interactions to be scored per month/week/day. Tasks include:

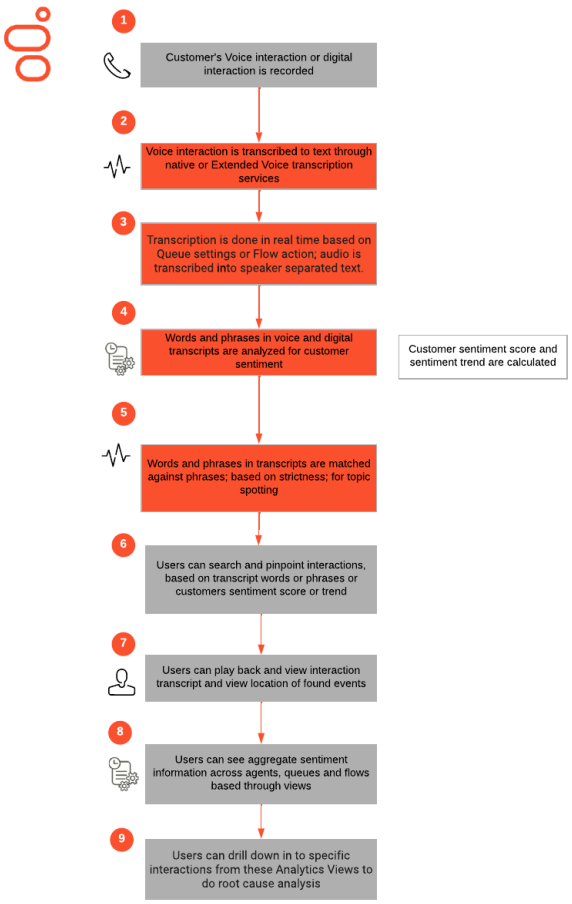


- Select interaction type and criteria
- Select forms
- Select evaluators
- Select for agent evaluation or for calibration
- Optionally: An evaluator with assignment permission selects from list of interactions and assign evaluation to self or to other evaluator.

5. The evaluator is notified of assigned evaluations. The evaluator proceeds with the reviews for their assigned agents. Genesys Cloud CX evaluator dashboard provides insight to assigned and completed evaluations.
6. The evaluator releases the evaluation for agent to review. Agent receives notification of completed evaluation available for their review.
7. Agent accesses quality results in the Genesys Cloud CX ->Performance-> My Performance-> Evaluations tab
    1. Agent checks off acknowledgment they reviewed evaluation and can add any comments.
    2. If agent requests further review - Quality administrator or Evaluator can review and rescore the interaction.
        1. Agent receives notification of rescored evaluation available for their review and same steps as above.
8. Quality evaluators and Supervisors can access the completed evaluations in the Genesys Cloud CX -> Performance -> Agents -> Evaluations.

Business Flow Description

1. Create the Survey Form.
2. Create a survey Canned Response for Get External Contact.
3. In Architect, create a Survey Invite Flow.
4. Create a survey policy action to deploy the

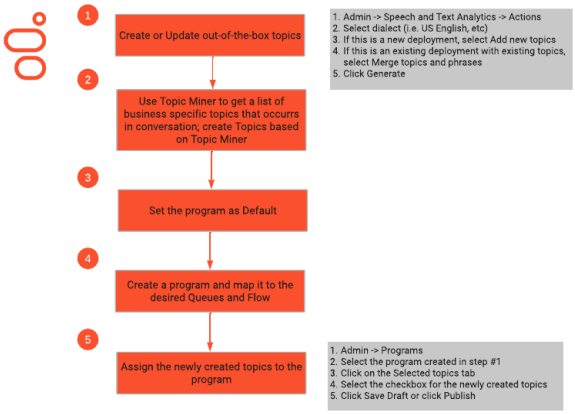


survey.

5. The customer receives survey invitation via email that includes a web link to the survey.
6. Survey results are received and viewable in Genesys Cloud CX:
   - View on the interaction
   - Survey Summary view
   - Survey Details view
   - Add survey data to Queues Performance view

Business Flow Description

1. Voice interaction or digital interaction is recorded in Genesys Cloud CX.
2. Genesys Cloud CX transcribes voice interaction through Genesys Native or Extended Voice Transcription Services
3. The transcription is performed in real time based on Queue settings or Flow action; audio is transcribed in to speaker separated text.
4. Words and phrases in voice and digital transcripts are analyzed for Customer Sentiment; a Customer Sentiment Score and Sentiment Trend are calculated for each interaction.
5. Words and phrases in voice and digital transcripts are matched against phrases; based on strictness for Topic Spotting.
6. Add business-specific words or phrases within new or existing topics to improve voice transcription. https://help.mypurecloud.com/faqs/how-do-i-increase-the-accuracy-of-voice-transcription/
7. Users can search for, and pinpoint interactions, based on transcript words or phrases, detected topics or customers sentiment score or trend.
8. Users can play back and view interaction transcript and view location of found events (sentiment and topics).
9. Users can see aggregate topic and

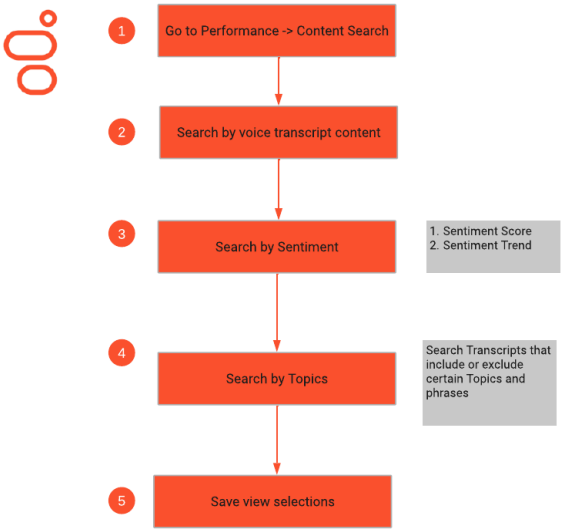


sentiment information across agents, queues and flows through Analytics Views.

10. Users can drill down in to specific interactions from these Analytics Views to do root cause analysis

Business Flow Description

1. Create or Update out-of-the-box topics (Create out-of-the-box topics)
    1. Admin -> Speech and Text Analytics -> Actions
    2. Select dialect (i.e. US English, etc.)
    3. If this is a new deployment, select Add new topics
    4. If this is an existing deployment with existing topics, select Merge topics and phrases
    5. Click Generate
2. Add business-specific words or phrases within new or existing topics to improve voice transcription. https://help.mypurecloud.com/faqs/how-do-i-increase-the-accuracy-of-voice-transcription/
3. Use Topic Miner to use key-phrase extraction to get a list of business specific topics that are already occurring within conversations; create Topics based on what is discovered through Topic Miner (https://help.mypurecloud.com/articles/about-the-topic-miner/)
4. Set a Default Program, so that is there is no mapping to a Queue or Flow, then there is a fallback (Select a Default Program)
5. Create a new program and map it to the desired Queues and Flows (Create a Program)
6. Assign any relevant out-of-the-box topics and newly created topics to the new program
    1. Admin -> Programs
    2. Select the program created above
    3. Click on the Selected topics tab



4. Select the checkbox for the required topics
5. Click Save Draft or click Publish

Business Flow Description

1. Go to Performance -> Content Search
2. Search by voice transcript content
    1. Transcript content – Displays interactions that contain specific word(s) in a transcription, with options to look for exact match, similar or not similar
3. Search by Sentiment
    1. Sentiment Score: Filter interactions by the customer's overall sentiment from -100 to +100. This score weighs all positive and negative markers at the end of the interaction to provide an indication of how the customer experienced their interaction with the contact center.
    2. Sentiment Trend: Filter interactions by the customer's sentiment trend, which is determined by comparing the sentiment in the first half or more of the interaction to the sentiment in the last few phrases of the interaction.
4. Search by Topics
    1. Search for transcripts that include selected topics: Interactions that have one or more phrases detected for the selected topics will be returned
    2. Search for transcripts that exclude selected topics: Interactions that do not have any detected phrases for the selected topics will be returned
5. Save view selections

Business and Distribution Logic

Business Logic

Archiving and Deleting Criteria

Genesys Cloud CX Policy can be configured to

defined a archive and deletion actions for recordings and screen recordings. For more information Recording Policy

Pause / Resume recording

Agents can pause or resume recordings as needed for compliance reasons. The ability for an agent to pause or resume a recording from the agent desktop is enabled or disabled based on customer requirements. APIs are also used to pause or resume a recording. If a recording of the interaction is paused for an interaction that is also being screen recorded, the pause/resume action is synchronized.

View and Download recording and screen recording

An interaction can have multiple recordings, including screen recordings. If applicable, navigate through the recordings associated with the interaction and to play the screen recording. For ,more information-> View a screen recording and Download recording

Quality Manager/ Administrator

Roles will determine the access to recording and screen recording of users. Roles can be provided additional permissions based on business requirement. The Quality Administrator and Quality Evaluator roles have the additional permissions than a user for viewing quality and recordings. For more information -> Roles and Permissions

Evaluation Sessions

To help ensure an agent's handling of interactions aligns with specific business requirements, evaluators receive assigned evaluations that they must complete according to the assignment process. A completed evaluation form provides a view into how an agent communicates with a customer. When used as part of evaluation sessions, these forms provide consistent and regular feedback and can help surface insightful results, comments, and suggestions. This can lead to formal skills training and action plans to improve agent performance. For more information-> Evaluation form

Distribution Logic

N/A

User Interface & Reporting

Agent UI

Quality Assurance and Compliance features are accessible from the Genesys Cloud CX application.

Reporting

Real-time Reporting

Genesys Cloud CX comes with several Reporting and Analytics features.

For detailed reporting features: https://help.mypurecloud.com/articles/about-reports-views-and-dashboards/

Historical Reporting

Genesys Cloud CX comes with several Reporting and Analytics features.

For detailed reporting features: https://help.mypurecloud.com/articles/about-reports-views-and-dashboards/

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** • Genesys Email Routing (CE16) • Genesys Chat Routing (CE18) • Genesys SMS Routing (CE29) • Genesys Messaging (CE34) **Inbound** • Genesys Personalized Routing with Callback (CE43)	None	None

General Assumptions

- 100% of ACD Interactions will be recorded. Internal calls (agent to agent) and inbound or outbound DID calls are not recorded.
- Recordings are based on what channels are configured.
- Screen recordings can be configured during interaction on any communication channel
- Surveys can be configured for any available channel.

Customer Responsibilities

N/A

Related Documentation

Genesys Catalog WEM

https://catalog.genesys.com/wem-landing-page/

https://catalog.genesys.com/wem-landing-page/wem-disciplines/wem-quality-assurance-and-compliance-discipline/

Document Version

- Version **1.1.4** last updated **June 30, 2026**

Resource Management (WE02) for Genesys Cloud

Optimize workforce planning and scheduling across all channels. Automate forecasting, scheduling and improve employee engagement.

What's the challenge?

Contact centers without the right insights and tools may find it hard to create balanced schedules that prioritize customer experience while considering employee hours, contracts, preferences and labor laws. Optimizing employees' schedules is a tricky balance between customer experience and higher workforce costs. Without the ability to create forecasts easily and accurately, it's a challenge to schedule your workforce effectively.

What's the solution?

The goal of resource management is to provide the right balance between business objectives and employee work/life balance. Genesys Cloud CX automatically gathers interaction data and produces the most mathematically accurate forecast possible(>95%) . Genesys Cloud CX schedules can be built for multiple weeks across multiple management units accommodating performance goals, constraints, labour laws and union agreements.

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 Flow
  - 4.3 Business Flow

    - 4.4 Business Flow
    - 4.5 Business Flow
    - 4.6 Business Flow
    - 4.7 Business Flow
    - 4.8 Business and Distribution Logic
- 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

Contact centers are complex, continually changing entities. They often have a large human resource with varied skills and operates long hours, making Resource management a challenge. If any one element falls away – agents calling in sick, for example – the entire process could break down. Spreadsheets were once the method of choice for resource management, and creating these spreadsheets manually required a skilled, numbers-savvy manager. As the contact center becomes increasingly complex. However, manual processes become less feasible.

Forecasting expected interaction volume and creating schedules for agents are two of the most important roles of resource management. It's tricky to get right: if you under-staff the center, customer satisfaction levels go down and agents become burned out.

Resource management software can help eliminate some of the most time-consuming tasks for managers while simultaneously increasing the accuracy of forecasts and the flexibility of schedules. Some of the most common challenges of resource management are:

- Inaccurate forecasts - While managers traditionally use historical data to create forecasts, there are other factors to consider (time of year, marketing activities and even weather). The more data points involved, the more fallible manual calculations become.
- An inability to be all channels- While interactions may take up most of the resource's time, other contact media, and even manual tasks must be factored into forecasts and schedules.
- A lack of real-time exception planning - An employee may need to leave suddenly, or an unexpected spike in volume could consume more resources than expected.
- Limitations to physical premises- While your current methods of scheduling and forecasting may work well enough for employees on your physical premises, what about remote employees? or business partners?
- Problems with adherence - Schedule adherence is critical to a well-run contact center, but manual methods don't account for it. If your customer interactions are time sensitive, understanding your resourcing shortfalls and availability can improve customer experience.

Resource management is all about assigning the right employees with the right skills to the right job at the right time and through a platform that address most of the well-known challenges. Challenges such as forecasting accuracy, multichannel resource allocation, exception handling, and adherence control have been around for a while. However, a wealth of resource management software today continues to use Erlang-C based forecasting and scheduling algorithms which do not provide the accuracy, processing speed nor the agility required to fulfill the expected digital channel explosion (digital transformation), the rise of asynchronous messaging and combined self and agent-assisted journeys.

Genesys Cloud Resource management helps simplify the process of forecasting interactions and scheduling employees in multichannel contact experience environment. Its AI-powered core capabilities help companies optimize resource utilization through highly accurate forecasts and lightning fast scheduling so that supervisors can spend more time coaching their agents to achieve

organizational goals.

Genesys Tempo is a mobile application on iOS and Android platforms for Genesys Cloud. It empowers the workforce to achieve a work-life balance with the ability to self-manage their working hours from their mobile device. Through this app, employees can view their schedule, receive notifications when a schedule is added, changed or removed, and keep track of their working hours quickly and efficiently. They can also put in time-off requests and receive notifications when request statuses change or changes occur. With the latest release, users can now see what days are available for leave, which slots are filling up quickly and where they are in line for waitlisted time-off requests.

By applying other workforce engagement capabilities, facilities and resource management teams can determine new arrangements for flexible work-time allocation, work-remote scenarios, gamification, and other employee self-managed services. This is done through agile, upgrade-free, and rapid innovations delivery in a single platform to keep operational efficiency, effectiveness, and business performance under control.

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	Getting the customer to the most appropriate resource on the first pass results in fewer transfers, shorter contacts, and improved end-customer satisfaction.
Improved Employee Utilization	Optimize planning and resource utilization through accurate omnichannel forecasting, scheduling, and skills. Improve Agent Adherence to Workforce Schedule by offering visibility into current information on agent performance metrics, schedule adherence, and forecast variances. This information allows for better management of variances between target and actual availability.
Reduced Administration Costs	Reduce manual workforce administration activities by decreasing the time and costs associated with manual WFM efforts through automated data collection, forecast creation and schedule generation.
Reduced Handle Time	Ensure that the appropriate number of best-qualified agents are scheduled at the right time.
Reduced Overtime Costs	Create precise schedules and reduce overtime expenses with more accurate forecasting.

Summary

Resource Management forms part of the critical operations in all modern customer experience environments and is a process that maximizes performance levels and competency for a Contact center. The process includes all the activities that are needed to maintain a productive workforce, such as human resource management, budgeting, forecasting, scheduling, and analytics.

Genesys Cloud Resource management provides software to support contact center workforce management that delivers a set of optimized schedules, utilizing agent skills and contract rules while providing editing and monitoring capabilities for the contact center. Demand-oriented resource management enables planners to optimize staffing by creating schedules that conform to the forecasted requirements. At the same time, a resource management solution helps organizations manage adherence to all relevant legislation, local agreements, and the contracts of individual employees such as work-life balance guidelines.

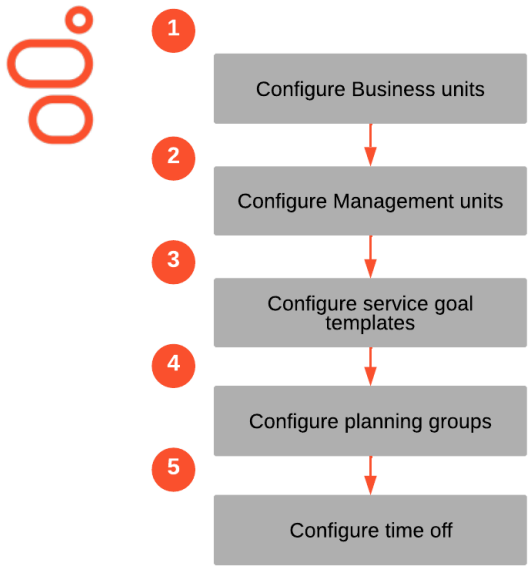
In today's world of multiple digital channels, a contact center could have set call hours but digital channels are always on. Without the right insights, it’s hard to create balanced schedules that allow contact centers to be responsive to digital interactions while considering employee hours, contracts, preferences, time off, and labor laws.

Genesys Cloud Resource management helps you find the right balance. 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.

Use Case Definition

Business Flow

(1) Operation Rules / Basic configuration



Business Flow Description

1. Configure Business Units
    1. Add Business Unit name, Start Day of week, Timezone, Division
    2. Select Historical weeks in Short-term forecasting
2. Configure Management units
    1. Add Management Unit Name, Division
    2. Add Planning Period, Maximum occupancy %, Planning period length
    3. Set Adherence Thresholds, Target, and Exceptions
    4. Enable or Disable Shift trading and set criteria for automatic review
3. Configure service goal templates
    1. Add Service goal Group Name

2. Set Service goals consisting of Interactions answered %, Enable average speed of answer and Abandonment rate

4. Configure planning groups
    1. Add Planning group name
    2. Select a Service goal template for the planning group
    3. Verify the Agents list who can handle the planning Group are displayed.
5. Configure/edit time off
    1. Add new Activity Code name
    2. Set Activity category, Length, Enable, or Disable activity code as Paid Time or Work time
    3. Set Time-off limit
    4. Configure Time-off plan

Business Flow

(2) Work Plan configuration

Business Flow

(3) Forecasting

Business Flow

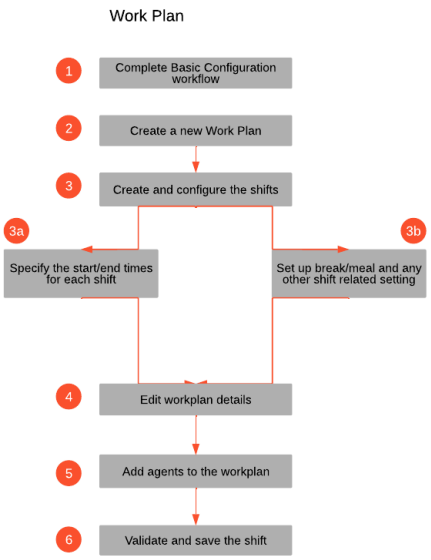
(4) Time off Planning

Business Flow

(5) Scheduling

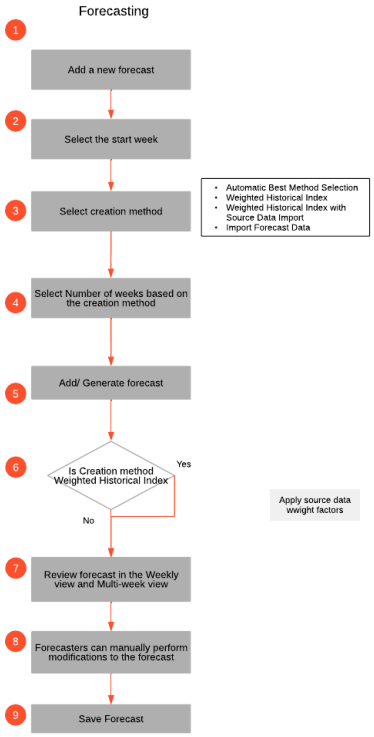
Business Flow

(6) Shift Trading



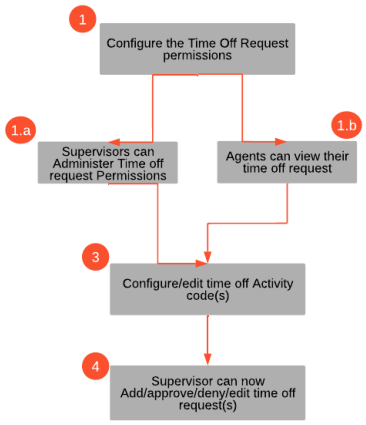
Business Flow Description

1. Complete the Operational rules/ Basic configuration workflow
2. Create a new work plan by Adding a new work plan or copy an existing work plan
3. Create and configure the shifts:
    1. Specify start / end-time for each shift.
    2. Set up break / meal and any other shift-related setting.
4. Edit Work plan details
    1. Set weekly constraints
        1. Enable or disable weekly paid time
        2. Set minimum and maximum workdays per week
        3. Set minimum consecutive time off per week
    2. Set weekend constraints
    3. Set planning period constraints consisting of
        1. Minimum and maximum days off per planning period
        2. Minimum and maximum paid time per planning period
    4. Set general constraints consisting of Daily paid time divisible, Maximum consecutive working days, and minimum time between shifts
5. Add Agents to the work plan.
6. Validate and Save work plan.



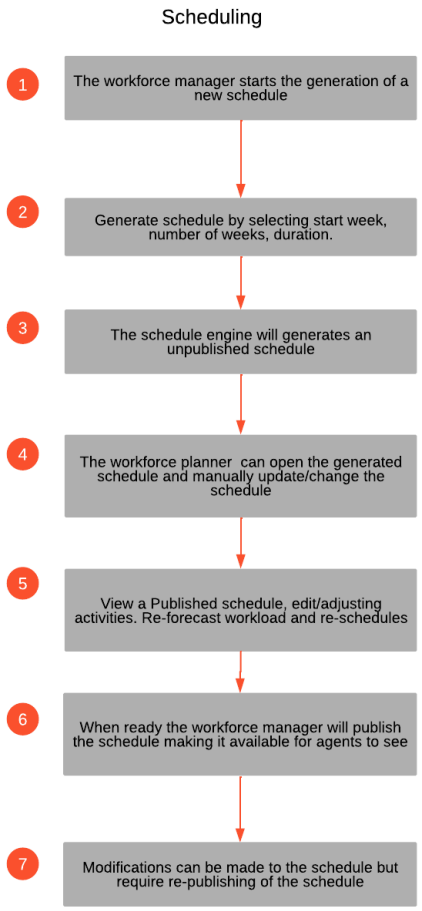
Business Flow Description

1. Add a new forecast
2. Select the start week
3. Select creation method
    1. Automatic best method selection
    2. Weighted historical index
    3. Weighted historical index with source data import (example)
    4. Import forecast data (example)
4. Select number of weeks based on the creation method
5. Add/Generate forecast
6. In case of Weighted historical index method, select source tab you apply the Source data weight factors for more emphasis on a specific period
7. Review forecast in the weekly view and multi-week view
8. Forecasters can manually perform modifications to the forecast
9. Save forecast



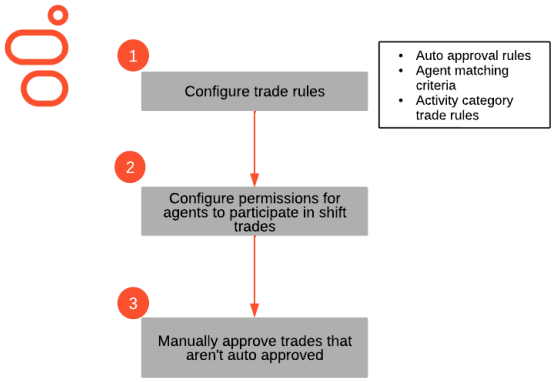
Business Flow Description

1. Configure the time off Request permissions
    1. Supervisors can Administer time off request Permissions through:
        1. Workforce Management > time off Requests > Add, Administer, Delete, Edit, View and Notify.
        2. Workforce Management > time off limit > Add, Edit, View and Delete.
        3. Workforce Management > time off plan> Add, Edit, View and Delete.
    2. Agents can view and make their time off request through: Performance > Overview > Agent tab > Schedule.
2. Configure/edit time off Activity code(s).
3. Set time-off limits.
4. Configure time-off plans as manual or automated.
5. Configure time-off limits for auto approve time-off plans.
6. Supervisor can also Add/approve/deny/edit time off request(s).



Business Flow Description

1. The Workforce manager starts the generation of a new schedule based on a forecast or by adding a blank schedule
2. Generate schedule
    1. Select Schedule start week
    2. Select number of weeks
    3. Schedule duration
    4. Description
3. The Schedule engine generates an unpublished schedule.
4. The Workforce planner opens the generated schedule and manually updates / changes the schedule. The workforce planner can edit the following in a schedule:
    1. Add, move, delete activity
    2. Swap shifts between agents
    3. Add shifts to agents
    4. Reschedule
    5. Publish schedule
5. View a Published schedule, edit/adjusting activities would change schedule for the agents concerned
    1. Reforecast workload and reschedules
6. When ready, the workforce manager publishes the schedule and makes it available for the agents.
7. Modifications to the schedule require republishing the schedule

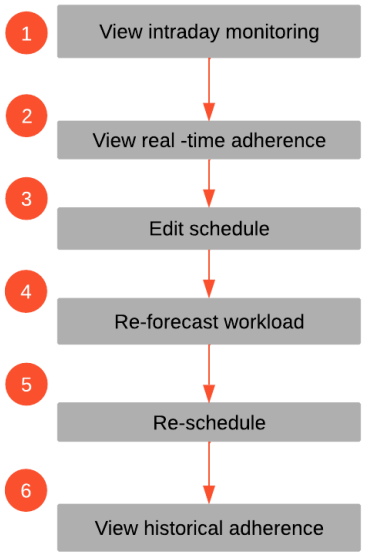


Business Flow Description

1. Configure trade rules.
    1. Auto approval rules
    2. Agent matching criteria
    3. Activity category trade rules
2. Configure permissions for agents to participate in shift trades
3. Manually approve trades that aren’t auto approved

Business Flow

(7) Intraday Management



Business Flow Description

1. View intraday monitoring
2. View real-time adherence
3. Edit schedule
4. Reforecast workload
5. Reschedule
6. View historical adherence

Business and Distribution Logic

Business Logic

A prerequisite to any basic WFM deployment is a formal discovery process. The formal discovery process produces specific documentation.

Distribution Logic

N/A

User Interface & Reporting

Agent UI

Resource Management features are accessible from the Genesys Cloud application.

Reporting

Real-time Reporting

Genesys Cloud WFM comes with several Reporting and Analytics features.

For detailed reporting features: https://help.mypurecloud.com/articles/about-reports-views-and-dashboards/

Historical Reporting

Genesys Cloud WFM comes with several Reporting and Analytics features.

For detailed reporting features: https://help.mypurecloud.com/articles/about-reports-views-and-dashboards/

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** • Genesys Email Routing (CE16) • Genesys Chat Routing (CE18) **Inbound** • Genesys Personalized Routing with Callback (CE43)	None	None

General Assumptions

- Workforce Resource Management is available for the Inbound Interaction type for all channels.
- A Business unit is limited to 5,000 agents.
- A management unit is limited to 1,500 agents.
- The use case does not include any of these advanced options:
  - Integration to 3rd party WFM tools **(There are native integrations for some. There** are public APIs**'s available as well. APIs are available to those agents that want to use them.**)
  - Advanced Customization - API customization
- Bullseye Routing configurations will not be supported as **bullseye routing and WFM don't play too well together. It's not best practice.**
- Scheduled callbacks, non-scheduled callback, and ACD Voicemail appear as callbacks in forecast and schedules.
- The setup of Business units, Planning groups, Service Goal templates, Management units, Agents, Activity Codes, and basic Work plans are a prerequisite for planning. **These objects must be configured and required permissions to use them and set them must be in place.** Genesys

Professional services can be used for initial setup of the pre-requisites.

- Complete the initial setup to before creating any schedule

Customer Responsibilities

N/A

Document Version

- Version **1.1.2** last updated **June 30, 2026**

Employee Performance (WE03) for Genesys Cloud

Agent Skills development, Performance management and Gamification

What's the challenge?

Contact centers undergo constant employee turnover, which makes it difficult to keep employees up-to-date on company policies, procedures, and new products and services. Contact centers need a solution to quickly onboard and train new employees.

Leaders have to identify high and low performance against defined KPIs to reward high performers and provide coaching and mentoring to employees who need it most. A tailored, appropriate, and precise development plan is vital.

But often, gauging performance is a challenge because KPI metrics are spread across multiple systems. Contact centers need a solution that brings this data together to provide a holistic scorecard to ensure an accurate and comprehensive view of performance.

Motivating and engaging employees to perform well can also prove challenging. Often, employees must navigate different systems or locations to complete tasks or understand their performance expectations. Having a centralized, at-a-glance view of tasks and clear, up-to-date information on their performance helps alleviate employee pains of working in a contact center and improve contact center KPIs like employee turnover, engagement, and productivity.

What's the solution?

Genesys Cloud CX provides a best-in-class workforce engagement suite for managing the end-to-end employee performance and development journey.

The solution enables effortless delivery of training, informational content, or assessments to employees to help employees onboard, learn, and stay up-to-date on vital information within your organization. These modules can be delivered automatically based on rules or manually assigned, allowing managers to build customized learning and development journeys for employees.

Genesys Cloud CX gives employees a single, holistic view of the information needed to perform their role successfully. Performance metrics from across the contact center are consolidated into a unified, gamified scorecard that can be viewed by employees and managers to understand performance across defined objectives. Employees can see where improvements are needed and compare performance amongst their peers for increased motivation, peer-to-peer learning, and improved performance.

Managers can quickly identify performance gaps and easily bring together interactions, evaluations and supporting documents to set up and conduct coaching sessions to improve KPIs.

Genesys Cloud CX lets you deploy powerful workforce engagement capabilities for onboarding, learning, coaching, performance management and gamification from a single platform. The solution makes the lives of your employees better by minimizing traditional, tedious manual processes and promoting a more collaborative working environment.

Link to video

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 Flow
  - 4.3 Business Flow
  - 4.4 Business and Distribution Logic
- 5 User Interface & Reporting
  - 5.1 Agent UI
  - 5.2 Reporting
- 6 Customer-facing Considerations
  - 6.1 Interdependencies
- 7 Related Documentation
  - 7.1 WEM Catalogue
  - 7.2 Genesys Cloud Documentation
  - 7.3 Document Version

Use Case Overview

Story and Business Context

High-performing, happy employees are an integral part to a successful contact center. In a recent study by Gartner, 86% of organizations consider employee engagement an equal or more important factor in achieving customer experience (CX) and, consequently, contact center goals. This is because the more engaged an employee is the more likely they will perform well in their role. To meet and surpass employee performance objectives, contact centers need to deploy a holistic, deeply integrated workforce engagement solution that provides the following key capabilities—onboarding development, learning & training, performance management, coaching, and gamification.

Personalized learning and development from day one

To deliver consistent, positive customer experiences, employees need to be well-informed and trained on company product, services, policies, and procedures. With Genesys Cloud you can deliver training, informational content, or assessments to employees to help them onboard, learn, and stay up-to-date. Personalized training can be delivered automatically based on rules or manually assigned, allowing managers to build customized learning and development journeys for employees within your organization. Regardless of start date, all employees quickly receive the necessary training to perform well in their role.

Powerful and intuitive performance management

Once employees are trained, leaders need to easily identify high and low performing employees against defined objectives and goals so that they can reward good performance and focus limited resources on coaching and mentoring those that need it most. Genesys Cloud consolidates performance metrics from across the platform into unified scorecards that can be viewed by managers and employees alike to understand performance across all defined objectives. Real-time metrics let managers and employees improve KPIs when needed most. Historical individual and team trends in performance help managers with planning, evaluations, and training initiatives.

Strategic coaching and training sessions

Strategically planned coaching sessions are known to significantly improve employee performance. Supervisors and quality managers can identify, assign, and schedule training sessions through a single, seamless process. Genesys Cloud centralizes all necessary information and documentation to complete a productive coaching session. And because it’s integrated to Workforce Management, you can complete in a single go — no need to check with other departments for best available time slot.

A single, easy-to-use employee dashboard

Employees not only want to meet their performance goals but grow and develop within their roles. Too often, however, an employee’s performance and development are hindered by the tools they use. Having to navigate several disjointed systems to complete tasks or understand their manager’s performance expectations frustrates employees and contributes to low employee engagement and productivity — ultimately affecting employee retention.

Empower your employees to outperform by giving them a single, holistic view of the information needed to perform their role successfully, including employee schedule, performance metrics and

goals, evaluations, and personalized development plans.

Gamified performance scores to motivate employees

Employee performance metrics across KPIs are gamified into user-friendly performance scorecards and leaderboards. Employees can see how their performance tracks and compares against teammates in real-time — encouraging healthy competition and facilitating performance improvements when needed. Gamification in employee performance management is key to building strong employee engagement, especially when your teams work remotely. By leveraging people's intrinsic motivator for status and recognition, competition and feeling of community, contact centers are able to motivate their employees to improve their overall performance and develop professionally along the way.

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	Access to intuitive, real-time gamified performance dashboards empowers agents to understand their performance and focus on self-development and improve their compentence.
Improved Employee Satisfaction	Easy-to-use, gamified performance dashboards, personalized learning modules, and insightful coaching sessions empower agents to reach performance goals faster, increasing employee satisfaction.
Improved Insights and Visibility	Providing a structured measurement and deep insights into agent development at each stage of the learning journey helps address any knowledge gaps diligently.
Reduced Administration Costs	Centralized and automated management of Employee performance, learning & development reduces administrative overhead, effort, and cost.
Reduced Employee Attrition	Clearly defined recognition and rewards system integrated with personalized skill development tools motivates agents to reach their goals and grow within the organization.

Summary

Genesys Cloud makes the lives of your employees better by minimizing tedious manual processes, providing actionable data transparency and consolidation, and streamlining how your various teams work together. Through a single, holistic solution, it delivers the key capabilities necessary for a modern and effective performance management strategy— onboarding, training & development, performance management, coaching, gamification, and voice of the employee. Genesys Cloud creates an easy-to-use, collaborate working environment for employees, supervisors, managers, and leadership.

Most contact center leaders aren't happy with the high costs of agent attrition, overwhelmed team

leaders, underwhelming CSAT/NPS scores, and all the other daily realities that cause them heartburn. Instead of suffering with the status quo of outdated, complicated, and disparate systems for workforce optimization, contact center center leaders can deploy an end-to-end workforce engagement management solution.

Performance management is an integral part of workforce engagement management for enabling contact center to align people, processes, and systems to organizational goals and objectives, such as customer satisfaction and experience, cost control and revenue generation.

This use case guides organizations to create organization-specific learning modules, schedule coaching and training sessions, customize performance scorecards, and implement gamification tools like leaderboards. Competitions, badges and social elements coming soon.

This use case and solution is well integrated providing native capabilities in learning management, coaching, gamification and performance management.

- Built-in learning module designer can add multimedia-rich assessments and learning material.
- Employee performance is consolidated from multiple sources and used in gamification.
- Coaching functionality delivers a set of capabilities that allows workforce planners to efficiently plan and execute offline scheduling of activities in the most efficient manner.

The agent activity view enables Agents to view a variety of data directly associated with their schedule, tasks, and performance. At a glance, the agent activity view provides a current summary of the off-queue information in one location. From the agent activity view, agents can view their current or upcoming schedule, scorecard, leaderboard, and coaching appointments. For examples, agents can:

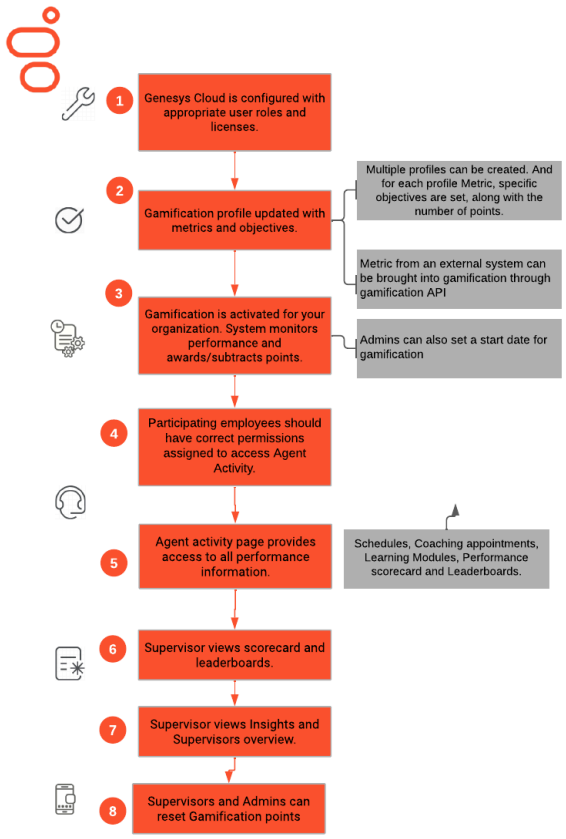
- See today’s schedule
- Stay in adherence / conformance (take breaks at the specified time)
- View manager evaluations and provide feedback
- Meet supervisor for coaching
- See My Performance compared against objectives and peer performance
- Get up-to-date on new policies and procedures
- Complete learning content of work on personal development

Real-time reporting provides detailed analysis of agent progress and task completion, while identifying any gaps in performance. Easy-to-use performance dashboards help organizations identify high-performers, the skills & capabilities necessary to deliver great customer experiences, and benchmark those results with the rest of the team. This improves performance management and decision-making around agent engagement and development activities — from onboarding, ad-hoc, and ongoing training. As skilled and capable agents are more likely to provide consistent customer experiences like maintaining resolution rates and handle times, it's vital to conduct effective onboarding programs, track & measure performance, and provide appropriate training and coaching sessions.

Use Case Definition

Business Flow

Performance Management and Gamification



Business Flow Description

1. Genesys Cloud is configured with appropriate user roles and licenses.
2. The Gamification Profile is updated with the specific set of Metrics to include as part of managing the performance of your Employees.
    1. For each Metric, specific objectives are set, along with the number of points to award based on the performance achieved.
3. Gamification is globally activated for the Organization, subsequently, the system monitors performance and awards/subtracts points accordingly.
    1. Admins can also set a Start Date for Gamification.
4. For those Employees participating in Performance Management and Gamification, the correct permissions must be assigned so that they can access the Activity page.
5. The Activity page provides Employees with one-click access to all of their upcoming and outstanding tasks as well as access to their performance information, this includes:
    1. Today’s schedule for the Employee, highlighting what activity is next if scheduled through workforce management.
    2. Any upcoming Coaching Appointments or assigned Development and Feedback Modules.
    3. Performance Scorecard with historical trend information.
    4. Leaderboards for overall and per metric performance.

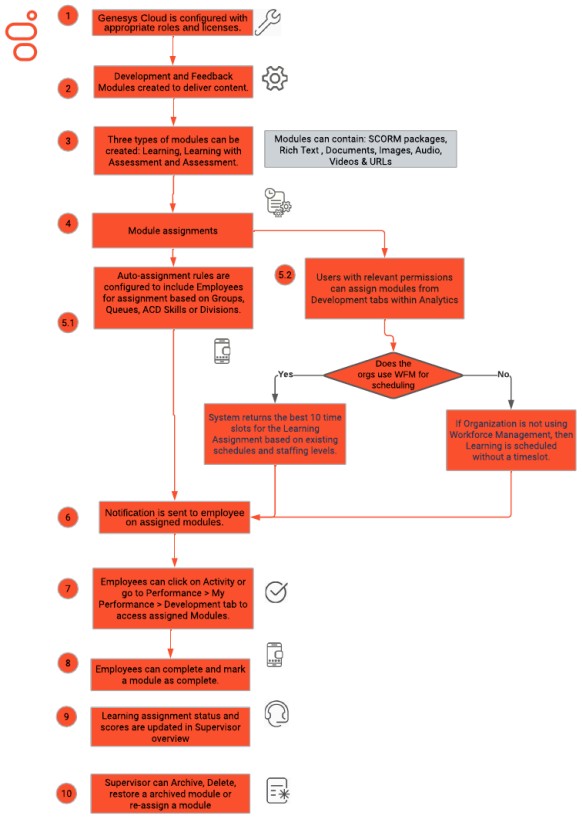
6. Supervisors can view an Employees' Scorecard through Performance > Agents > Scorecard tab.
7. Supervisors can view overall Leaderboards through Performance > Agents > Leaderboards tab.
8. Supervisors and Admins can reset the Gamification if needed.

Business Flow

Coaching

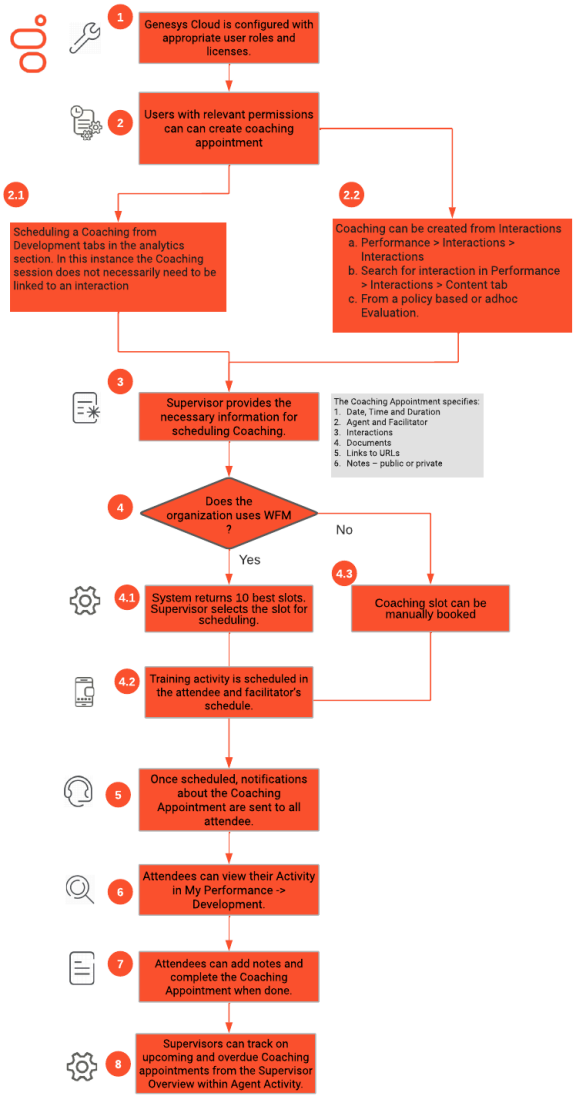
Business Flow

Development and Feedback



Business Flow Description

1. Genesys Cloud is configured with appropriate user roles and licenses.
2. Development and Feedback Modules are created to deliver content to Employees
3. Modules can contain: Documents, Images, Audio, Videos and Links to URLs
4. Modules can be assigned to users in one of two ways:
    1. Auto-assignment rules are configured which can include or exclude Employees for assignment based on Groups, Queues, ACD Skills or Divisions.
        1. Modules are Published and delivered to Employees immediately or overnight if Group, Queue, ACD Skill or Division memberships are updated.
    2. Users with relevant permissions are able to navigate to the Development tabs within Analytics and assign modules at an individual level by selecting from a list of available modules. This allows Managers to assign content to individuals at the point of need to resolve challenges at an individual level



Business Flow Description

1. Genesys Cloud is configured with appropriate user roles and licenses.
2. Users with relevant permissions such as Supervisors and Quality Administrators can schedule a coaching appointment by:
    1. Clicking on the Schedule Coaching button from the Interaction Detail view to create a Coaching appointment with that interaction included or can add that interaction to an existing Coaching appointment.
        1. Supervisors or Quality Evaluators can find interaction of interest to use for Coaching in multiple ways:
            1. Searching for interactions of interest in Performance > Interactions > Interactions tab using various meta data filter criteria.
            2. Searching for interactions of interest in Performance > Interactions > Content tab using various meta data and speech and text analytics filter criteria.
            3. Directly from a policy based or Ad-hoc Evaluation.
    2. Scheduling a Coaching session by navigating to the Development tabs in the analytics section. In this instance the Coaching session does not necessarily need to be linked to an interaction, allowing Coaching sessions to be created for all requirement
3. The Coaching Appointment specifies:
    - Date, Time and Duration
    - Agent and Facilitator
    - Interactions
    - Documents
    - Links to URLs
    - Notes – public or private
4. If the Organization is using Workforce Management for scheduling, the system will return the best 10 time slots for the

Coaching Appointment based on existing schedules and staffing levels.

- A Coaching session is scheduled in the attendee and facilitator's schedule.
- If Organization is not using Workforce Management then Coaching is scheduled without a timeslot

5. Once scheduled, notifications about the Coaching Appointment are sent to all attendee through their Inbox.
6. Attendees can click on Activity or go to Performance > My Performance > Development tab to see and access any upcoming Coaching Appointments.
7. Attendees can add notes and complete the Coaching Appointment when done.

5. Once assigned, a notification about the assigned Modules is sent to the Employee through their Inbox.
6. Employees can click on Activity or go to Performance > My Performance > Development tab to see and access any assigned Modules.
7. Employees can mark a Module as Complete when done.

Business and Distribution Logic

Business Logic

- Genesys Cloud is configured with appropriate user roles and licenses.
- Business rules must be set up to assign the learning items to the agent target group.
- Genesys Cloud Coaching permissions are needed to schedule a Coaching session.
- Genesys Cloud Workforce Management is needed for optimizing scheduling.
- Gamification/ Performance Manager must decides on the Performance data that needs to be measured.
- Supervisor and Agents need to finalize the performance objectives that are to be achieved including the KPI that needs to be tracked.
- Periodic review process with necessary learning items and coaching should take place between the Supervisor and agent to agree the final targets.
- Agents can view their Assigned Learning Module from Module Icon in the Inbox
- Agents can also view their Assigned Learning items with appropriate due dates in the Activity Tab of Genesys Cloud.

- Agent feedbacks should always be incorporated to enhance the system on a periodic basis.

Distribution Logic

N/A

User Interface & Reporting

Agent UI

N/A

Reporting

Real-time Reporting

Reporting and Analytics insights on Employee Performance would be available as part of the Functionality reports and through Analytics reports.

Historical Reporting

Same as Real time reporting. Reporting and Analytics insights on Employee Performance would be available as part of the Functionality reports and through Analytics 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	**Workforce Engagement** • Quality Assurance and Compliance (WE01) • Resource Management (WE02)	None

General Assumptions

Employee Performance functionalities are available only for Genesys Cloud3

Customer Responsibilities

N/A

Related Documentation

WEM Catalogue

https://catalog.genesys.com/wem-landing-page/

https://catalog.genesys.com/wem-landing-page/wem-disciplines/wem-employee-performance-discipline/

Genesys Cloud Documentation

Genesys Cloud Documentation is the source of truth for updated functionalities addressed by the Use case,

https://help.mypurecloud.com/articles/schedule-a-coaching-appointment/

https://help.mypurecloud.com/articles/coaching-with-quality-management-overview/

https://help.mypurecloud.com/articles/agent-activity-overview/

https://help.mypurecloud.com/articles/about-gamification/

https://help.mypurecloud.com/articles/about-development-and-feedback-modules/

Document Version

- Version **1.0.1** last updated **June 30, 2026**