

GENESYS CLOUD DIRECT ROUTING

All information subject to change



THE ^{*}POWER ^{*}OF US

WHICH USERS IS DIRECT ROUTING FOR?

- * Users who interact with customers but are not necessarily 'traditional' agents assigned to specific queues
- * Users who should be consistently reachable directly from customers and other internal users as ACD interactions
- * Example employee personas:
 - Sales Representatives
 - Financial Advisors
 - Concierge Services Representatives
 - Commission-based roles

PAIN POINTS ADDRESSED BY DIRECT ROUTING

- * Provide all ACD functionality including call recording (including internal), wrap-up codes, secure pause, etc.
- * Ability to deliver interactions to users who are either 'Available and Off Queue' or 'On Queue'
- * Allow users to also be included in other queues, typically as overflow
- * Allow users to specify backup options in case they're not reachable
- * Ability to call/message outbound from a queue using the user's own number/email

WHAT IS THE DIRECT ROUTING FLOW?

- * Inbound calls/SMS/emails to designated user numbers/addresses are treated as ACD calls/messages/emails
- * Interactions are routed to a queue, from where they target the designated user with an ACD interaction
- * If the user doesn't respond within the alerting timeout, go to back-up
 - User and Admin can configure a user's backup option (user or queue)
 - Admin can limit users' ability to change backup option via permission
 - Can be configured to go to backup immediately, or leave a voicemail
 - Interaction (callback, email or SMS) can be configured to go to backup after a configurable period (for example, transfer the callback to a backup queue after 2 days as the targeted user is out of office)

HOW DOES IT WORK?

- * User numbers or email addresses can be tagged as 'ACD-enabled' via API
- * ACD-enabled numbers can be added to the call route (IVR), which connect interactions to inbound flows; the flows identify the user to be targeted based on the number being contacted, and attach that userID as context to the interaction
 - Emails are directly associated with flows
- * Direct Routing users can be added to Direct Routing queues
 - Interactions will attempt to route to the user identified in the inbound flow
 - If there's no userID attached, the routing method on the queue will be used
- * New logic handles moving the interaction through back-up options, based on the user/queue back-up configuration
- * New value for 'Routing Requested' and 'Routing Used' = 'Direct Routing'

HOW IS IT CONFIGURED?

Inbound and in-queue flow configuration

- * Simple first-time set-up via a CX-as-Code accelerator
 - Creates a sample route, inbound flow, in-queue flow, voicemail flow (with required actions/functions)
 - Sample Direct Routing system components are not restricted from changes, can be used as-is or copied/edited
- *or create configuration from scratch
 - Flexibility for customization to specific business needs e.g. add to existing flow or use multiple direct routing queues
 - Admin configures route, flows and queue
 - New first class actions in Architect available

User and queue configuration

- * User numbers/emails can be enabled for Direct Routing managed via bulk methods
 - SCIM, bulk import, or API
- * Users can be added to Direct Routing queues via UI or API
 - Can leverage Groups to add queue members
- * Direct Routing Queue and user backup settings can be managed via UI or API
 - Admin control via permissions for user-level selection of backup options
- * Outbound dialing option on queue to pulse users' voice and SMS DIDs, email
- * Data tables and number plans not required, but can be used to extend base capabilities

DIRECT ROUTING USER SETTINGS

- * Direct Routing user DID and backup option shown on Profile Card
- * User Preferences showing:
 - Backup assignments
 - Timeout
 - Skip timeout option
- * Permissions for user access to edit backup options

Available 36m 32s

Busy

Away

Break

Meal

Meeting

Training

Alex Wood

clifjonesdca

No location available.

Emergency Address 1 334-567-5301

Editable emergency address not applicable for selected primary number.

What's on your mind?

Alex Wood WebRTC Phone

Direct Routing Address +1 919-919-9198

Backup Queue UC Queue

Forward My Calls

Activate Queues

Out of Office > Preferences > Logout

Preferences

Notifications

Theme

Chat

Password

Voicemail PIN

Language

Sound

Video

Direct Routing

Direct Routing Settings

You may configure your direct routing settings here.

Your current direct routing number: +1 919-919-9198

You are back up for:

Mello Knight Offline

Alex Wood - Test Available

Jason Glassbrook

Backup Routing Option

Queue

If you are already assigned as a backup to other users, you may only select a queue as your backup.

Queue

UC Queue

☐ Skip timeout and reassign to backup immediately

Go To Backup After

Days 0 Hours 0 Minutes 0

Save Changes

DIRECT CALL ROUTING

Admin should:

- * Create and manage call route and flow*
- * Assign routing to call flow*
- * Assign user DIDs to call route

* If not using the CX-as-Code accelerator

Routing / Call Routing

Scheduling

Call Routing

Message Routing

Emergency Groups

Disconnect Interactions

Call Route

Call Route Details

Name *

Direct Routing Call Route

Division *

Home

Only people with Routing > Call Route > View permission in this division can use this call route.

When is this call route open?

☒ Always

☐ Based on a schedule group

Select a schedule group...

The schedule group defines open, closed, and holiday schedules to match against. A different call flow will be used for each type of schedule.

☐ This call route closes in emergency cases

What call flow should be used?

Route to *

Direct Routing Call Flow

Inbound Numbers

Select inbound numbers...

+1 317-563-7386

Direct Routing user DIDs

Save Cancel

DIRECT ROUTING QUEUE

Admin should:

- Create 'Direct Routing' Queue, or use an existing queue*
- Configure queue backup settings
- All other queue settings are customizable and will apply to non-direct interactions

* If not using the CX-as-Code accelerator

The screenshot shows the 'Direct Routing Queue' configuration page in the Genesys Contact Center. The page has a sidebar on the left with various settings categories: ACD Skills & Languages, Utilization, Queues, Wrap-Up Codes, Email, Canned Responses, Co-browse, Analytics, and Scripts. The main content area has tabs for General, Routing, Members, Wrap-up Codes, Voice, Chat, Message, Email, and Callback. The 'General' tab is selected. The 'Name' field is highlighted with an orange box and contains the text 'Direct Routing Queue'. Below it is a 'Description' field. Further down is a 'Division' dropdown menu set to 'Home'. At the bottom, there is an 'After Call Work' dropdown set to 'Optional' and an 'After Call Work Timeout (Seconds)' field. A checkbox for 'Enable Manual Assignment' is also present.

NEW ROUTING METHOD

- * New 'Direct Routing' routing method is used, **but not selectable on the queue** (akin to Last Agent Routing or Manual Routing)
- * Direct Routing will be used if a flow sends an interaction to the queue with a 'direct routing user' attached in participant data
- * Default backup options apply where user settings aren't present

The screenshot shows the 'Contact Center / Queues / VIP New' configuration page. The left sidebar lists various settings: ACD Skills & Languages, Utilization, Queues, Wrap-Up Codes, Email, Canned Responses, Co-browse, Widgets, Analytics, Panel Manager, Scripts, and Script Templates. The main content area is titled 'Routing' and contains the following settings:

- General** (selected tab)
- Direct Routing Default Backup Option**: A dropdown menu set to 'Queue'.
- Queue**: A dropdown menu set to 'Direct Routing Queue'.
- Go to Backup After**: A time selector set to 3 Days, 4 Hours, and 23 Minutes.
- ☐ **Skip timeout and reassign to backup immediately**

OUTBOUND CID

- * New option to send Direct Routing user DID outbound
- * Admin should enable for direct routing queues

The image shows two screenshots of the Genesys Contact Center configuration interface. The top screenshot is for the 'Voice' tab, and the bottom screenshot is for the 'Message' tab. Both screenshots show the 'Direct Routing Queue' configuration page. In the 'Voice' tab, the 'Use Direct Routing DID Address' checkbox is highlighted with an orange box. In the 'Message' tab, the 'Use Direct Routing DID Address' checkbox is also highlighted with an orange box. The interface includes a left sidebar with navigation options like 'ACD Skills & Languages', 'Utilization', 'Queues', 'Wrap-Up Codes', 'Email', 'Canned Responses', 'Co-browse', 'Widgets', 'Analytics', 'Panel Manager', 'Scripts', and 'Script Templates'. The main content area has tabs for 'General', 'Routing', 'Members', 'Wrap-up Codes', 'Voice', 'Chat', 'Message', 'Email', and 'Callback'. The 'Voice' tab shows settings for 'Service Level', 'Calling Party Name', 'Alerting Timeout (Seconds)', 'In-queue Flow', 'Whisper Audio', and 'Default Script'. The 'Message' tab shows settings for 'Service Level', 'Alerting Timeout (Seconds)', 'In-queue Message Flow', 'Outbound SMS Number', and 'Default Script'.

Voice Tab Configuration:

- Service Level: 80%
- Service Level Target (Seconds):
- Calling Party Name:
- Calling Party Number: (201) 555-0123
- ☐ Use Direct Routing DID Address
- Alerting Timeout (Seconds): 8
- In-queue Flow: Search for flow by name
- Default Script: Search for script by name
- Whisper Audio: ☐ Only play whisper audio if agent is configured for auto-answer, ☒ Play whisper audio for all agents
- Voice Transcription: Off

Message Tab Configuration:

- Service Level: 80%
- Service Level Target (Seconds):
- Alerting Timeout (Seconds): 30
- In-queue Message Flow: Search for flow by name
- Default Script: Search for script by name
- Outbound SMS Number: Search for sms number
- ☐ Use Direct Routing DID Address

EMAIL OUTBOUND ADDRESS

* Configured at email
address level

Contact Center / Email

ACD Skills & Languages

Utilization

Queues

Wrap-Up Codes

Email

Canned Responses

Analytics

Scripts

Script Templates

Email Address Details

Manage your Email Address Details

Email Address *

treybuck @bughntdca.inindca.com

From Name *

Name that appears to the recipient when an agent responds to an email.

Trey Buck

From Email Address

Specify an email address that appears to the recipient when an agent responds to an email. This address must be configured in Genesys Cloud; previous Bcc and Reply To settings will be carried over with the specified email address.

Select an email address Select a Domain

Reply To

This address overrides the 'Reply to' address the customer sees when replying to the original email. If you forward email to Genesys Cloud and want to exclude the forwarding address from replies, set the forwarding address as the Reply To. Field format: example@example.com

treybuck@bughntdca.inindca.com

BCC Recipients

The specified recipients will be automatically added to the BCC list for outbound emails and cannot be removed by agents. Field format: example@example.com

example@example.com

Add BCC Recipients

Save **Cancel**

Service Level

80%

Alerting Timeout (Seconds)

300

In-queue Email Flow

Search for flow by name

Service Level Target (Seconds)

86400

Outbound Email Address

Select an email address @ szilagyi.mypurecloud.com

☐ Use Direct Routing Address

Default Script

Search for script by name

Email History *

Include email history with the latest agent response. Options are:

- ☐ Always auto-include email history with each agent response
- ☐ Never include email history with each agent's response
- ☒ Let agents decide for each response

Enable Multiple Actions

Enable multiple reply and forward actions for the last email in the email thread

☐ Off

Email Routing *

All email, except spam, will follow the specified route option.

☒ Always route to this flow

Flow

Direct Routing Inbound Email Flow

☐ Always route to this queue

☐ Do not route (outbound email only)

Spam Routing *

The system determines spam as potentially harmful emails. Specify an option for spam email.

- ☐ Route spam email to this flow
- ☒ Disconnect all email that is detected as spam

Use Email Signature ☐ Off

PERFORMANCE WORKSPACE DIRECT ROUTING FILTER

January 20, 2023 - February 19, 2023					FILTERS	
Conver...	Direction	Queue	Wrap-up	+	Search for filters	
7s	Inbound	-	-	⋮	Interactions	
6s	Inbound/O utbound	-	-	⋮	<input checked="" type="checkbox"/> Manual	
3s	Inbound	-	-	⋮	<input checked="" type="checkbox"/> Predictive	
4s	Inbound	-	-	⋮	<input checked="" type="checkbox"/> Preferred	
10s	Inbound	-	-	⋮	<input checked="" type="checkbox"/> Standard	
7s	Inbound	-	-	⋮	ROUTING USED	
29s	Inbound	-	-	⋮	<input checked="" type="checkbox"/> Bullseye	
27s	Outbound	-	-	⋮	<input checked="" type="checkbox"/> Last	
47s	Outbound	-	-	⋮	<input checked="" type="checkbox"/> Manual	
35s	Inbound	-	-	⋮	<input checked="" type="checkbox"/> Predictive	
					<input checked="" type="checkbox"/> Preferred	
					<input checked="" type="checkbox"/> Standard	
					<input checked="" type="checkbox"/> Direct	
					AGENT ASSIST	

OTHER ROUTING METHODS VS DIRECT ROUTING

Other Routing Methods

All queued
agents pool



Skills/scoring
to adjust
target agent
pool



Delivered
to agent



Direct Routing

Delivered directly
to agent



Delivered
to backup
queue



Delivered
to backup
user



All other queue
options/routing methods



PRICING

Included with:

- * GC1 for Voice
- * GC2 for Voice + Digital (SMS, Email)

Thank you!



Direct Routing

Summary of new features & schedule

New features in scope of release

- * User's phone, SMS or email address can be added to a call route
 - Allows inbound interactions targeted at a user's number/address to route through flows and be transferred to ACD queues
- * Users can configure where to route interactions in case of unavailability
 - Backup can be a user or a queue
 - Call, email or SMS can be routed to backup immediately, or after a configurable period
- * Users can receive a call/email/SMS while 'Off Queue' and 'Available'
 - No need for users unfamiliar with 'traditional' contact center to go On Queue to receive calls
- * Ability to dial outbound from queue using user's number/email address, rather than the default queue number/email
- * New Analytics filter for 'Direct Routing' interactions

Timeline/roadmap

- * Beta targeted for Q1 '23
- * GA targeted for Q2 '24
- * Future roadmap dependent on feedback during beta