GENESYS CLOUD DIRECT ROUTING

All information subject to change





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

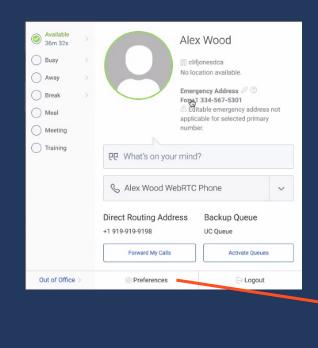
User and queue configuration

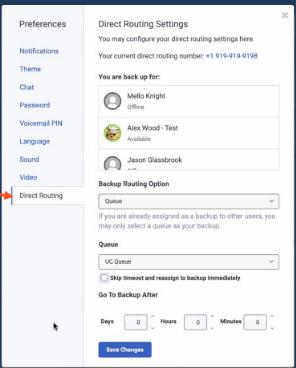
- User numbers/emails can be enabled for Direct Routing managed via bulk methods
 - SCIM, bulk import, or API
- Users can be added to Direct Routing queues via UI or API
 - Can leverage Groups to add queue members
- Direct Routing Queue and user backup settings can be managed via UI or API
 - Admin control 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



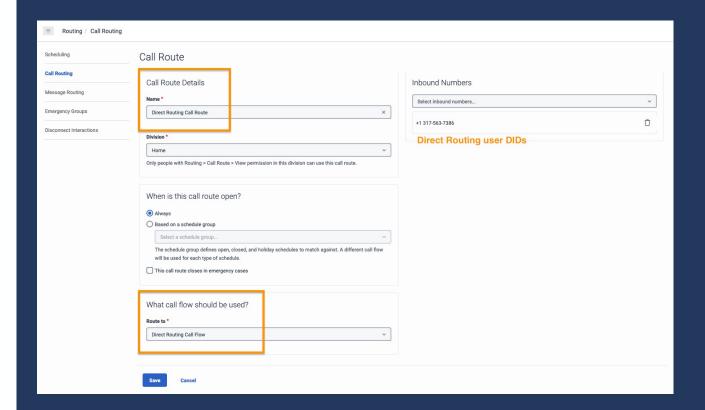




DIRECT GALL ROUTING

Admin should:

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

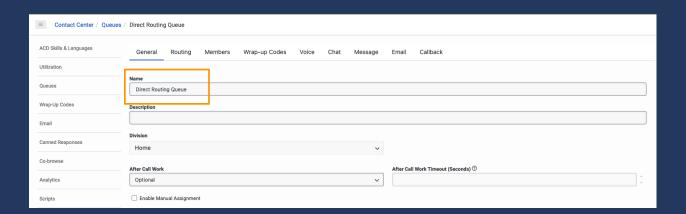




DIRECT ROUTING QUEUE

Admin should:

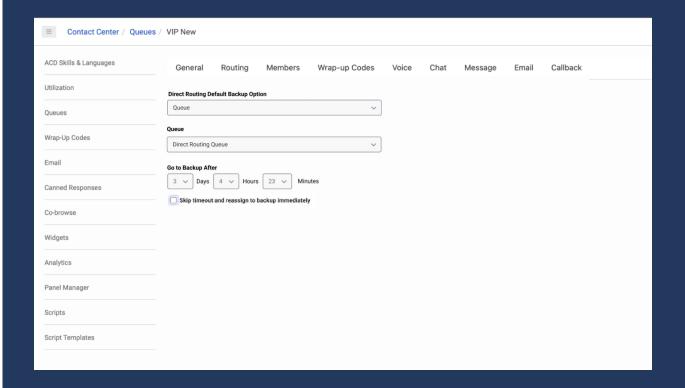
- Create 'Direct Routing' Queue, or use an existing queue*
- Configure queue backup settings
- All other queue settings are customizable and will apply to non-direct interactions





NEW ROUTING METHOD

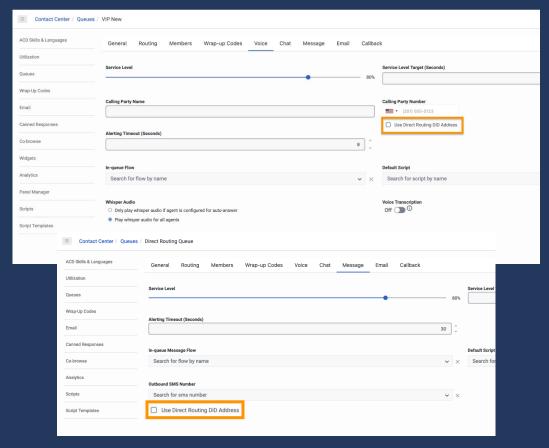
- New 'Direct Routing' routing method is used, but not selectable on the queue (akin to Last Agent Routing or Manual Routing)
- Direct Routing will be used if a flow sends an interaction to the queue with a 'direct routing user' attached in participant data
- Default backup options apply where user settings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





OUTBOUND

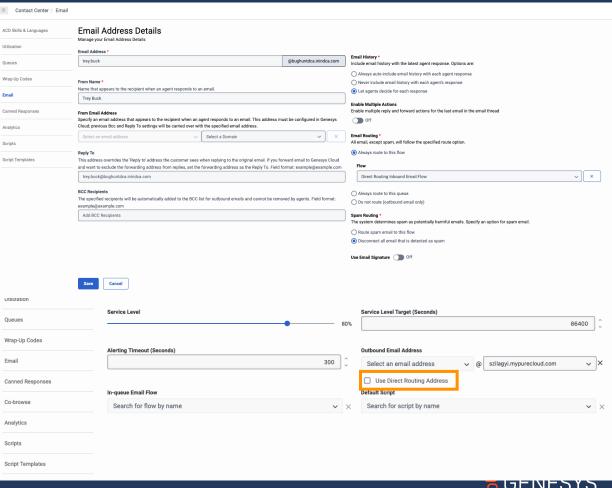
- New option to send Direct Routing user DID outbound
- * Admin should enable for direct routing queues



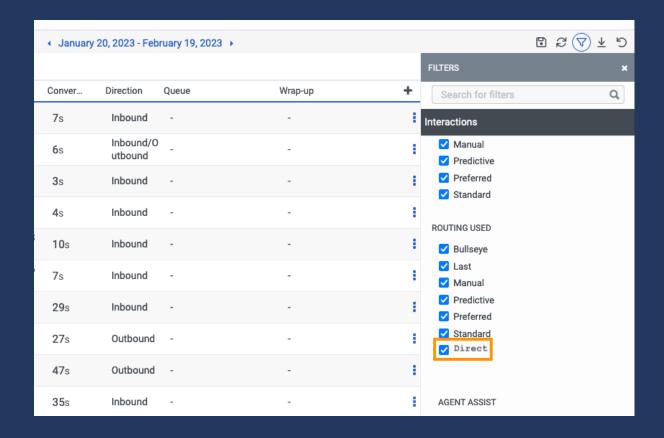


EMAIL OUTBOUND ADDRESS

* Configured at email address level

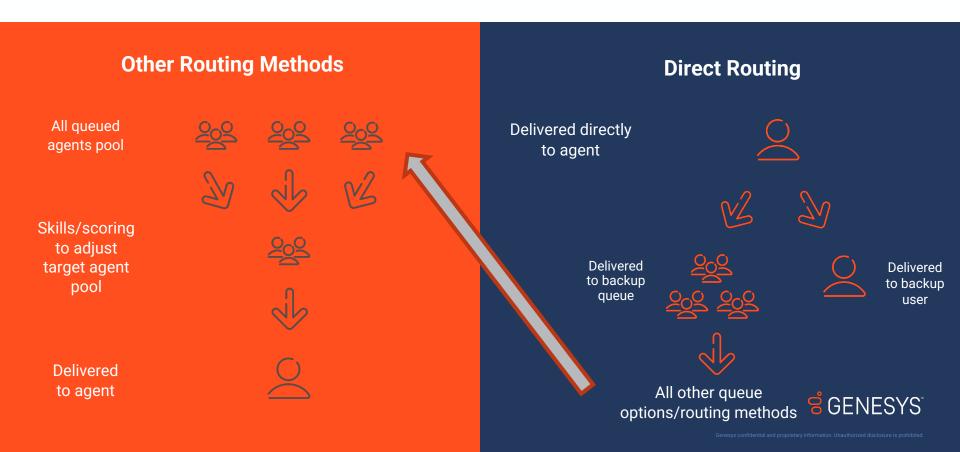


PERFORMANCE WORKSPACE DIRECT ROUTING FILTER





OTHER ROUTING METHODS VS DIRECT ROUTING



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

