

Genesys Cloud - Premier Edition: Customer Service Record Tool Help

Virtual Contact Center Current

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Customer Service Record Tool Help

What is the Customer Service Record (CSR) Tool?

Customer Service Record (CSR) Tool is an on-demand and easy to use application to help Genesys resellers create and manage customers (the subscribers). Genesys resellers can easily create new customers and control various features pertaining to self-service and premier edition to which those customers have access.

About This Help

Some of the topics explaining the different features of the CSR Tool are:

Subscriber Management	Phone Number Management
Find information about managing subscriber	Find information about managing phone
information, including:	numbers, including:
Creating an account	Adding phone numbers
Searching for accounts	Assigning phone numbers
Configuring Features Find information about configuring certain features: Configuring GVP call recording Enabling CX Builder features Copying a site	

About the CSR Tool

With the CSR Tool, you can search for customers (the subscribers) or create and manage their accounts. You can also manage other features, for example, the phone number pool.

😉 Genesys [.]	CSR	<u>Loqout</u>
Subscriber Lookup - Your Favorites Chance Account Status Phone Line Admin - Bione Line Lookup - Assion / Unassion Number - Browse Available Numbers - Number Pool Admin Add Entergrees Account Coov Ste NL/Custom Grammar	Subscriber Lookup Search	

CSR Tool Main View

Before you start

Before you can access the CSR tool, you have to be logged into the Genesys network or the Genesys VPN, or have a white labeled IP address. Contact your account representative to get CSR access permissions.

After your permissions are set up, you can access the CSR tool here: https://csr.angel.com/ admin/CSR/.

Important

This tool cannot be accessed over the open internet.

Add-on functionality

The following features are add-on options but they can not be activated through this CSR Tool. Contact Genesys if any of your customers want to activate one or more of these capabilities.

- · Call recording
- · Email routing for ACD
- Chat Routing for ACD

Subscriber Management

In CX Builder, the Subscriber is an enterprise customer. The account is known as a *Subscriber* account within the CSR tool. When you, as a reseller, create/add new enterprise customer with this tool, a unique ID, known as the *Subscriber ID*, is generated.

Subscriber management enables you to:

- · Create an enterprise customer account
- Search for an account
- · Return Subscriber Lookup results and account usage
- · View and set up Subscriber account details
- Change an account status

Creating an Enterprise Account

There are a few tasks to creating a new enterprise customer (the subscriber) account before the subscriber can use CX Builder. They include adding the account, assigning a phone number to it, and enabling the CX Builder features.

Adding an Enterprise Account

Use Add Enterprise Account, as shown below, to create a new subscriber:

Subscriber Lookup a - Your Favorites <u>Change Account Status</u> Phone Line Admin	Add Enterprise A	Account new account owner below.
- Phone Line Lookup	First Name	
- Assign / Unassign Number	Last Name	
- Browse Available Numbers	Email Address	
- Number Pool Admin	Phone Number	
Add Enterprise Account	Time Zone	[GMT -4.0] America/New_York - Eastern Standard Time
Copy Site	Data Format	mm/dd/yyyy 🔻
NL/Custom Grammar	Billing ID	
	Company Name	
	Create Account	

Adding an Enterprise Customer Account

To create a new subscriber using the CSR tool:

1. Enter the new user details in the **Add Enterprise Account** form. Specify the following:

- First Name
- Last Name
- **Email Address** The email address you enter is also used as the user's login ID, as well as the default contact email address.
- **Phone Number** This number is the contact phone number, not the DNIS number assigned to the voice site.
- Time Zone CSR uses the default time zone from your site builder account. You can change the time zone using CX Builder. The drop-down menu supports all global time zones.
- **Date Format** You can choose either of the two formats for the account (*mm/dd/yyyy* or *dd/mm/yyyy*)
- Company Name
- **Billing ID** This field is not used by Telstra. Specify anything, like "not_used," because an entry is required to create the account.
- 2. Click **Create Account**. A welcome email is then sent to the email address provided prompting the customer (the subscriber) to complete the account creation process by creating a password, a PIN, and a security question.

Assigning a Phone Number to the Account

After creating the account, you need to assign a phone number to the account using the Subscriber ID for the account just created.

- 1. Click **Subscriber Lookup** and search for the subscriber using the subscriber email address.
- 2. Copy the ID for the subscriber.
- 3. On the left side of your screen, click Assign/Unassign Number.
- 4. Enter a phone number you want to assign in the **Phone Number** field.
- 5. Paste the ID you just copied into the **Subscriber ID** field.
- 6. Click **Assign.** At the top of the screen, the CSR tool displays a confirmation of the assignment.

Enabling CX Builder Features

If you haven't already done so, you need to enable CX Builder features for your account. See Enabling CX Builder Features.

Searching for an Account

Use **Subscriber Lookup**, as shown below, to search for existing subscriber customers:

Subscriber Lookup

Search

Email 🔻	GO Search for Partial Matches
Email First Name Last Name Phone Number Subscriber ID Site Number	
AccountStatus Oem Oem Billing ID	

Searching for Subscribers

You can use the following search options:

- Email
- First Name
- Last Name
- Phone Number
- Subscriber ID
- Site Number
- · AccountStatus
- Oem (type) (added when creating an account)
- Oem Billing ID (added when creating an account)

Using Subscriber Lookup Results

Subscriber Lookup

Subscriber	Lookup R	esults								1	Results 1 -
ID	Name	Email	Number(s)	Status	Login	<u>Favorites</u>	Usage	Enterprise Subscribe	Oem Name	Oem Billing ID	Sub Account Users
<u>0a346861-</u> <u>04-</u> 14be637cfb5- f7a2ce90-01e	Kimberly	@genesyslab.com	<u>61285144100</u> <u>64-9-3612340</u> <u>61-8-</u> <u>92341231</u>	Active	Login	<u>Add(+)</u>	CheckUsage	N/A	telstra	not_used	

Subscriber Search Results

After you do a search, you can use the results to get more detailed information about the accounts.

The Subscriber Lookup results return the following information and links:

- Click an ID to access the Subscriber Details page for that subscriber. Use the Subscriber Details page to enable/disable features for subscribers. (See Subscriber Lookup Details for more information.)
- Click a phone number to access the **Phone Line Lookup** page. The **Phone Line Lookup** page displays the details of that phone number.
- Click a Status to access the Change Account Status page. The subscriber's email address is pre-populated in the field.
- Click Login to log into the subscriber's CX Builder account.
- Click Add(+) to add a subscriber to the CSR user's favorites list.
- Click **CheckUsage** to display the **Lookup Usage** screen. You can specify the Data Range, Phone Type, and Lookup Type to return the Lookup Usage results.

Using the Lookup Usage Screen

Subscriber Lookup - Your Favorites	Lookup Usage
Change Account Status Phone Line Admin	kimberly.doucet@genesyslab.com
- Phone Line Lookup	Date Range
- Assign / Unassign Number - Browse Available Numbers	Single Month StartingMar 01, 2015 ▼
- <u>Number Pool Admin</u> Add Enterprise Account	Start Date (mm/dd/yyyy) End Date
Copy Site NL/Custom Grammar	Phone Type
NDCustom Granmar	Local,International and Toll Free
	Local Only Toll Free Only
	International Only
	Lookup Type
	Usage Summary
	 Individual Record Details Break Down by Voice Site
	Cubmä
	Submit

Lookup	Usage	Screen
--------	-------	--------

Using this screen, you can request various usage results for the account.

- 1. Select a Date Range.
 - If you select Single Month, select the month from the drop-down list.
 - If you select **Start Date**, specify the Start Date and End date.
- 2. Select a Phone Type based on the results you wish. You have four options:

- Local International and Toll Free
- Local Only
- Toll Free Only
- International Only
- 3. Select a Lookup Type.
 - If you select Usage Summary, a screen displays the Minute Usage (# of Calls, Total Minutes, Recorded Minutes) and the NALC. Note: NALC is associated with billing but is not used by Telstra, as it has its own system.
 - If you select Individual Record Details, a screen provides you with the same information as Usage Summary and also includes a table with information on Angel Number, Caller ID, Start Time, Duration, and Call Recording Duration.
 - If you select **Break Down by Voice Sites**, you have the option to also select **Calculate Usage Minutes For Each Voice Site (Will be longer)**.
 - If you don't select the additional option, the screen provides the same information as Usage Summary and also a table with the site names created for this account, the associated Numbers (if assigned), Lookup, Name, and Address information.
 - If you select the additional option, the screen provides the same information as Usage Summary and the table also includes Usage and Call Recording Duration.

Subscriber Lookup Details

Subscriber Lookup

Search

Subscriber ID 🔻 0a346861-04-14be637cfb5-f7a2ce9 GO 🖉 Search for Partial Matches

Active		
Voice Site Information		
Number(s)	Kimberly	
Assign Number	61285144199	
<u>61285144100</u> <u>61-8-92341231</u>	@genesysl	
2 number(s)		
	Billing ID : not_used	
	Number(s) Assign Number 61285144100 61-8-92341231	

61285144199	
@genesysla	b.com - [Change]
Billing ID : not_used	
Account Information	
Service Plan	Enterprise
OEM Name	telstra
Start Date	
Configure Account	
ASR Enabled?	Yes Disable
SIP Refer?	No Enable
CXA?	Yes GloballVRVCC ▼ Save
ACD?	Yes
ASR Languages	
C English-Australia	
Save ASR	Languages
GVP Call Recording?	Yes Configure
NL/Custom Grammars	No Enable
File: Choose File	No file chosen
	Upload
Common Tasks	
Login Change Account Status	

Subscriber Lookup Details

The **Subscriber Details** page displays the subscriber status, voice sites, and phone numbers. This page also allows the CSR user to enable/disable features.

- In the Voice Site Information section:
 - Click the site name to access that Voice Site in the subscriber's CX Builder account.
 - Click the phone number to access the Assign/Unassign Phone Number page.
- The **Contact Information** section displays the subscriber's name, contact phone number, email address, and billing ID.

- Click the Change link to the right of the email address to change the email address of that account. Clicking this link sends an email prompting the subscriber to create a new password for their account.
- In the **Configure Account** section, click the links to the right of the features to enable/disable the feature. See Enabling CX Builder Features for details.

Changing an Account Status

This feature allows resellers to temporarily suspend a customer's (subscriber) account if there are issues (for example billing) and also reactivate it once those issues are resolved. Use **Change Account Status** to change the account's status (per business rules).

Subscriber Lookup - <u>Your Favorites</u>	Change Account Status
Change Account Status	Enter Email Addresses Manually (separate multiple addresses with a comma)
Phone Line Admin	
- Phone Line Lookup	
- Assign / Unassign Number	
- Browse Available Numbers	
- Number Pool Admin	Suspend Un-Suspend
Add Enterprise Account	
Copy Site	
NL/Custom Grammar	

Changing the Account Status

To use this feature:

- 1. In the field, enter e-mail address for the subscriber's account.
- 2. Click Suspend or Un-Suspend, depending on the scenario:
 - Suspend—Suspends the subscriber account.
 - **Un-Suspend**—Reactivates (Un-suspends) the subscriber account.

Phone Number Management

Use the **Phone Line Admin** section to add, lookup, and manage phone numbers (local and toll-free). You can also use it to view details about a specific phone number, such as the Dialed Number Identification Service (DNIS) and the subscriber to whom the number is assigned.

Adding Phone Numbers

Click **Number Pool Admin** to access the **Phone Line Admin** screen, as shown below, to add phone numbers to a pool of them that will be available to all customers. Customers can then see these phone numbers in CX Builder and add/assign them to their sites.

Subscriber Lookup	Phone Line Admin
- <u>Your Favorites</u> Change Account Status	Number Pool Administration
Phone Line Admin	Enter Manually
- Phone Line Lookup	
- Assign / Unassign Number	800-555-1234, 8005551234, tolfree, 1, 800, 7f000001-11- 2222222222-3333333-444
- Browse Available Numbers	
- Number Pool Admin	
Add Enterprise Account	
Copy Site	
NL/Custom Grammar	
	Add Remove
	Add format: number, DNIS, type, countrycode, areacode [, subscriberID] Example: 800-555-1234, 8005551234, tollfree, 1, 800, 7f000001-11- 2222222222-3333333-444 Possible number types: tollfree, local, intl_local, or intl_tollfree
	Remove format (DNIS): 800xxxxxx Example: 8005551234

Adding Phone Numbers

You add one number at a time. Use the following format when adding phone numbers:

- Add format:
 - number (example: 800-555-1234)
 - DNIS (example: 8005551234)

- type (example: tollfree)
- countrycode (example: 61)
- areacode (example: 800)
- subscriberID (example: 7f000001-11-222222222-33333333-444)
- Possible number types:
 - tollfree
 - local
 - intl_local
 - o intl_tollfree
- Remove format (DNIS): 800xxxxxxx (example: 8005551234)

Searching for Phone Numbers

Use **Phone Line Lookup** to search for existing phone numbers. In the Phone number field, enter all or part of a number and click **Go**.

• If you enter part of the number, the tool returns a list of numbers that match the digits you entered. To see details on a specific number returned, click the number.

Subscriber Lookup - <u>Your Favorites</u> Change Account Status	Phone Lin	e Lookup
Phone Line Admin - <u>Phone Line Lookup</u> - <u>Assign / Unassign Number</u>	6128	GO
- <u>Browse Available Numbers</u> - <u>Number Pool Admin</u> <u>Add Enterprise Account</u> <u>Copy Site</u> <u>NL/Custom Grammar</u>	61285144107 61-2-85144109 64-6-3612876 61-2-85144120 61285144106 61-2-85144116 61-2-85144116 61-2-85144116 61-2-85144116 61-2-85144116 61-2-85144116 61-2-85144110 61285144110 61-2-88101230 61285144110 61285144110 61285144110 61285144108 61-2-88101234 61-2-88101231	$\frac{61-2-888888888}{61-2-85144119}$ $\frac{61285144114}{64-2-3612876}$ $\frac{61285144115}{61-2-85144118}$ $\frac{61285144117}{61285144139}$ $\frac{64-7-3612876}{61285144102}$ $\frac{61285144102}{61285144128}$ $\frac{61-2-85144105}{61-2-85144105}$ $\frac{61-2-85144104}{61285144104}$

Phone Lookup Results - Partial Number Search

 If you entered a specific and complete number, the tool returns a screen providing details about that number.

Subscriber Lookup	Phone Line	Lookup		
- Your Favorites				
Change Account Status	Phone number form	nat: xxx-xxx-xxxx		
Phone Line Admin	61285144106 GO			
- Phone Line Lookup				
- Assign / Unassign Number				
- Browse Available Numbers				
- Number Pool Admin	Phone Number	61285144106 [<u>unassign</u>]	Contact Information	
Add Enterprise Account	Phone number format: xxx-xxx-xxxx Line Admin tone Line Lookup ssign / Unassign Number owse Available Numbers mber Pool Admin hetrrise Account Site status used Status used Subscriber ID 0a346861-04-14b3c97ea5e-			
Copy Site	2.110			
NL/Custom Grammar	Status	used	genesysrk5@gmail.com	
	Subscriber ID	0a346861-04-14b3c97ea5e- 01b43816-1eb [Lookup]		

Phone Lookup Results - Specific Number Search

The CSR tool also lets you know if a phone line is assigned and to which account it is assigned. Through this screen, you can assign or un-assign a number.

Browsing Available Numbers

Subscriber Lookup	Browse Av	vailable Numbers
- Your Favorites		
Change Account Status	Available <u>Toll-Fre</u>	e Numbers: 15
Phone Line Admin	Available <u>Local</u> N	
- Phone Line Lookup		tional Local Numbers: 0 tional Toll-Free Numbers: 0
- Assign / Unassign Number		
- Browse Available Numbers	Available telstra	tollfree numbers - Page 1 of 1.
- Number Pool Admin		
Add Enterprise Account	<u>64-9-3612341</u>	<u>64-9-3612567</u>
Copy Site	<u>61285144110</u>	<u>61285144111</u>
	<u>61-2-85144116</u>	<u>61285144128</u>
NL/Custom Grammar	<u>61285144139</u>	<u>61-2-88101230</u>
	61-2-88101234	<u>61-2-88888888</u>
	61-3-93651231	<u>61-4-19123450</u>
	61-4-19123451	<u>61-7-34661234</u>
	61-8-92341230	

Browsing Available Numbers

- Click Browse Available Numbers to see a list of phone numbers that are not yet assigned.
- Click a number and the Phone Line Lookup screen displays. If you wish to assign it, click assign and the Assign/Unassign Phone Number screen displays for you to do so.

Assigning or Unassigning Phone Numbers

Use **Assign/Unassign Phone Number**, as shown below, to assign a specific phone number to an account, if available. You can also use it to un-assign a phone number from an account.

Subscriber Lookup - Your Favorites	Assign / Unassign Phone Number			
Change Account Status	Phone number f	ormat: xxx-xxx-xxxx		
Phone Line Admin	Phone Number	Subscriber ID		
- <u>Phone Line Lookup</u> - <u>Assiqn / Unassiqn Number</u> - <u>Browse Available Numbers</u> - <u>Number Pool Admin</u>	61285144110	0a346861-04-14	Assign Unassign	
Add Enterprise Account				
Copy Site				
NL/Custom Grammar				

Assigning or Unassigning Phone Numbers



To access Assign/Ussassign Phone Number:

- 1. If you are on the **Phone Line Lookup** screen, click **[assign]** or **[unassign]** next to the phone number, which opens the **Assign/Unassign Phone Number** screen.
- 2. On the **Assign/Unassign Phone Number** screen, click **Assign** or **Unassign** to change the assignment status of the phone number.

Enabling CX Builder Features

Configure Account				
ASR Enabled?	Yes Disable			
SIP Refer?	Yes Disable			
CXA?	Yes GloballVRVCC ▼ Save			
ACD?	Yes			
ASR Languages 🖃				
🕑 English-Australia				
Save ASR	Languages			
GVP Call Recording?	Yes Configure			
NL/Custom Grammars	No Enable			
File: Choose File	No file chosen Upload			
Common Tasks				
Login Change Account Status				

Subscriber - CX Builder Configuration

Enable CX Builder features through the subscriber's enterprise account. If you haven't created your account yet, see Creating an Enterprise Account.

- 1. Using Subscriber Lookup, search for the subscriber.
- 2. From the **Subscriber Lookup Results** screen, click the **ID** of the subscriber to view and manage the features enabled for that account.
- 3. On the right side of your screen locate the **Configure Account** section and enable the features as described here:
 - ASR Enabled—click Enable, as this enables the ability to leverage speech input in the voice site. Once enabled, CX Builder users can create voice sites using Speech and DTMF.

- SIP Refer Leave as No, as this is not supported.
- **CXA** —click **Enable** and select **GloballVRVCC.** CFA provides three options in the drop-down menu:
 - **GlobalIVR**—Only IVR-related reports are enabled on the **CX Analytics** tab in CX Builder.
 - **GlobalVCC**—If a subscriber is not paying for CX Analytics, but using VCC, select this option. If this option is enabled, all IVR reports are disabled, and only the four CX Analytics standard reports are enabled under VCC (using the CX Analytics application).
 - **GloballVRVCC** Both IVR and VCC analytics reports are enabled.
- ACD—click Enable as this enables subscribers access to VCC. Once this option is enabled, you cannot use the CSR Tool to disable it for a subscriber.
 IMPORTANT: ACD must always be enabled. Otherwise, the voice file synchronization will not work, making the IVR unavailable.
- ASR Languages—click the + (plus sign) toggle to expand the ASR Languages section. By default, English-Australia is listed and selected. No other languages are available.
- **GVP Call Recording**—click **Configure** to set up call recording using Genesys Voice Platform (GVP). See instructions below.
- **NL/Custom Grammars**—if you have already uploaded a grammar, click Enable to enable it.

Note: Under the Common Tasks section, if you click **Login**, you can login to CX Builder. If you click **Change Account Status**, you open the Change Account Status screen.

Configuring GVP Call Recording

GVP Call Recording Configuration

Save Cancel	
Phone Number	Call Recording Enable/Disable
61285144100	\bigtriangledown
64-9-3612340	
61-8-92341231	
Inbound Call Recording Outbound Call Recording Save Cancel	

Subscriber - GVP Call Recording Configuration

When you click **Configure** in the **Configure Account** section of the Subscriber Lookup screen, the **GVP Call Recording Configuration** screen displays.

- 1. For the phone numbers listed, select whether to enable call recording for that number. An empty check box indicates that call recording for that number is disabled.
- 2. Select either or both **Inbound Call Recording** and **Outbound Call Recording**, as desired.
- 3. Click Save. A confirmation note appears.

Important

Call recording is now supported for agent-initiated outbound calls.

Important

After you click Save to enable Call Recording for the
first time, there is a time lag (15-20 seconds) before
the screen displays that Call Recording is enabled.

Enabling NL/Custom Grammars

NL/Custom Grammars	No <u>Enable</u>	
File: Browse_ e	enGB_IVR-IVR.grxml	Upload

A grammar is a file with words and patterns of words identified that can be used by the speech recognizer as it listens to a caller's response. If you want to use a natural language custom grammar, you can upload one or more to your account.

1. Under the NL/Custom Grammars section, next to File, click **Browse**.

Subscriber - Custom Grammar Upload

- 2. Browse to locate the grammar, either a pre-compiled (.grxml) or a compiled (.gram) file, and click **Open.** The name of the file appears.
- 3. Click Upload.
- 4. Click Enable.

Note: In CX Builder, you specify the grammar on the Question page when you select the Natural Language Response Type.

Copy Site

Site Copy

Site Numb	er	
Account	Email 🔻	
		Submit

Copy Site Feature

With this feature, you can copy an existing site in CX Builder. To do so:

- 1. In the **Site Number** field, enter the site number for the site you want to copy.
- 2. In the **Account** field, select either Email or Subscriber ID and enter the associated information.
- 3. Click Submit.

The tool processes the request and displays confirmation text. The site is now copied and the site name is appended with "Copy" in CX Builder.

NL/Custom Grammar

Subscriber Lookup - Your Favorites	NL/Custom Grammar				
Change Account Status Phone Line Admin	Account:	Email	-	@genesyslab.com	Search
- <u>Phone Line Lookup</u> - <u>Assign / Unassign Number</u>	enGB	_IVR-IVR.g	xml		
- <u>Browse Available Numbers</u> - <u>Number Pool Admin</u>	Delete				
Add Enterprise Account					
Copy Site					
NL/Custom Grammar					

NL/Custom Grammar Feature

Use this feature to search for and return a list of custom natural language grammars you have previously uploaded for use with your account.

• Select Email or Subscriber ID from the drop-down menu next to the Account field, and enter the associated information.

For information on how to upload a custom grammar, see *Enabling Custom Grammars* on the Enabling CX Builder Features page.

Note: In CX Builder, you specify the grammar on the Question page when you select the Natural Language Response Type.

Genesys Customer Care Support

If you need help with any of the features, please contact Genesys Customer Care for the Cloud.

Genesys Customer Care Case Management Portal

Open and manage your cases by logging into the Customer Care portal.

Note: You might have a unique portal that can be used to access Customer Care.

For instructions on using the **Case Management Tool**, refer to *Section 7: Case Management Process*.

Cloud Contact Phone Numbers

Need additional assistance with using your Genesys Cloud solution? We're happy to help. Just contact us using one of the phone numbers listed on the following page: Cloud Contact Phone Numbers.