Genesys Cloud - Premier Edition: Customer Service Record Tool Help

Virtual Contact Center Current

7/10/2015

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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

Find information about managing subscriber information, including:

Creating an account
Searching for accounts

Phone Number Management

Find information about managing phone numbers, including:

Adding phone numbers
Assigning phone numbers

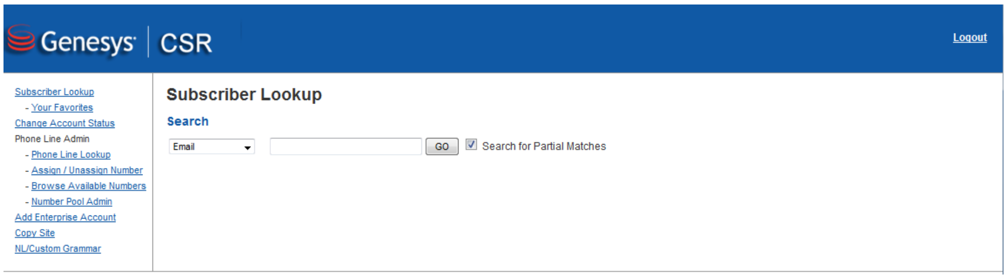
Configuring Features

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.



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:

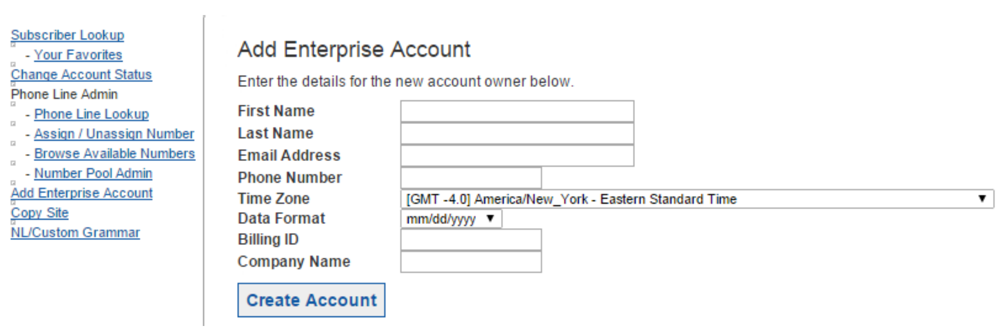
- Create an enterprise customer account
- Search for an account
- Return Subscriber Lookup results and account usage
- View and set up Subscriber account details
- Change an account status

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:



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.

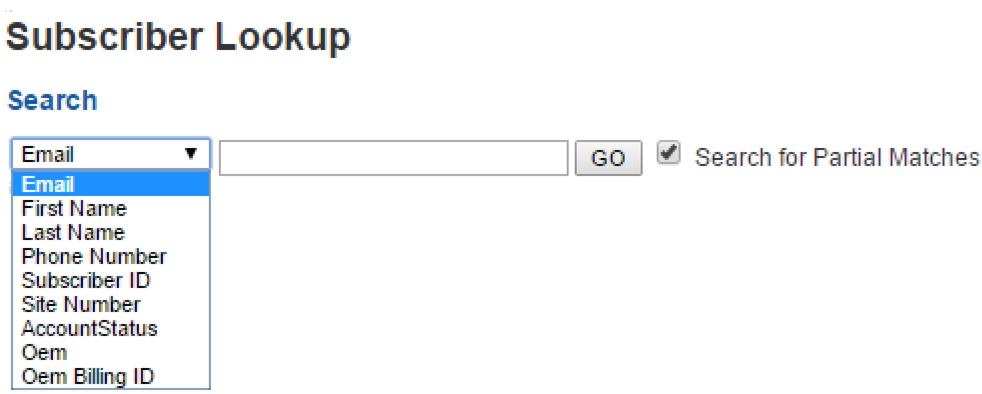
1. Click **Subscriber Lookup** and search for the subscriber using the subscriber email address.
2. Copy the ID for the subscriber.
3. On the left side of your screen, click **Assign/Unassign Number**.
4. Enter a phone number you want to assign in the **Phone Number** field.
5. Paste the ID you just 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:

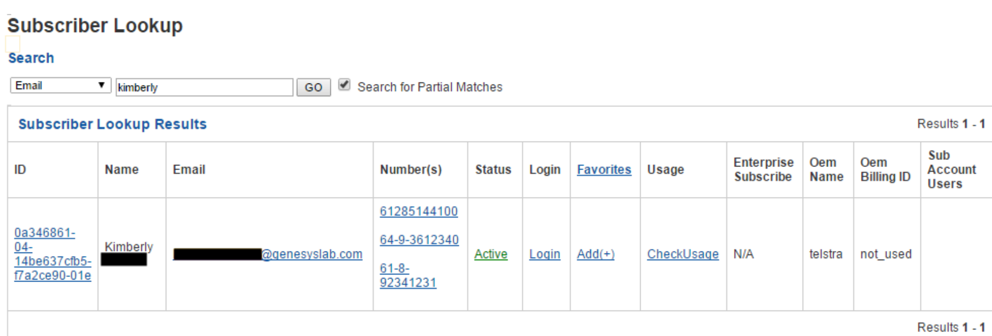


Searching for Subscribers

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



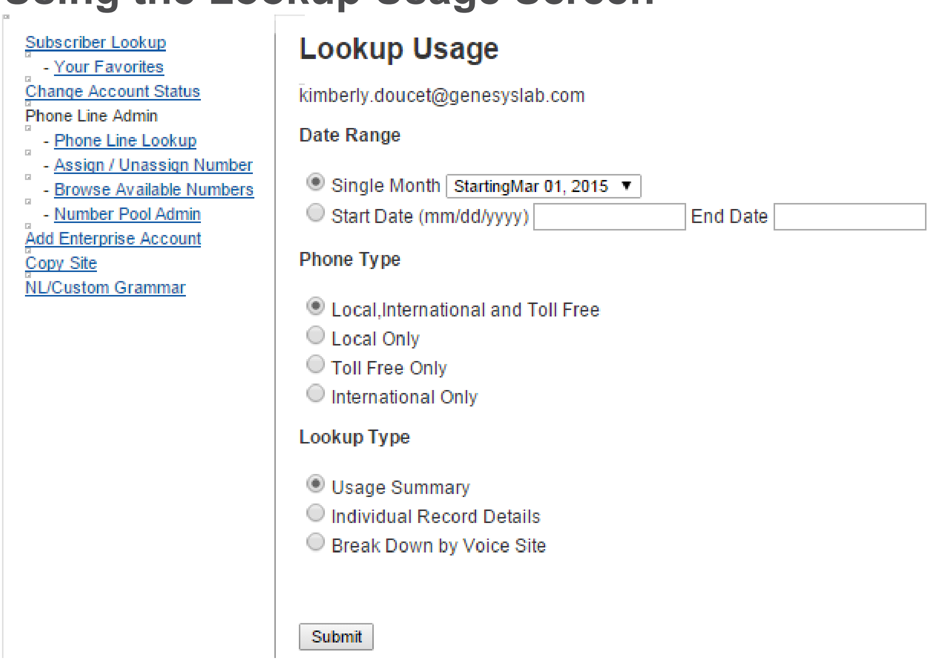
Subscriber Search Results

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



Lookup Usage Screen

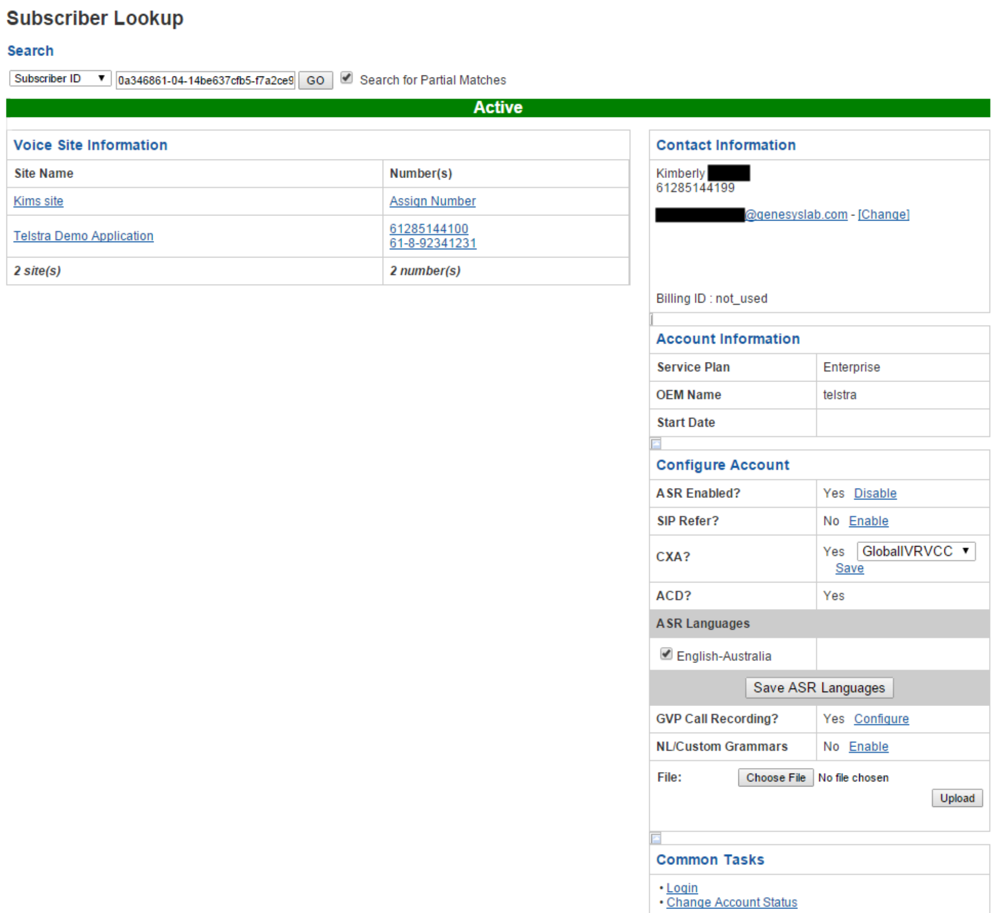
Using this screen, you can request various usage results for the account.

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 Details

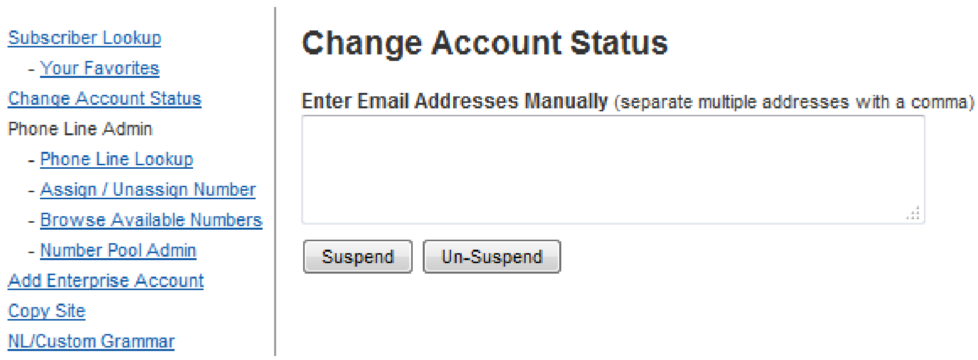
The **Subscriber Details** page displays the subscriber status, voice sites, and phone numbers. This page also allows the CSR user to enable/disable features.

- 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).



Changing the Account Status

To use this feature:

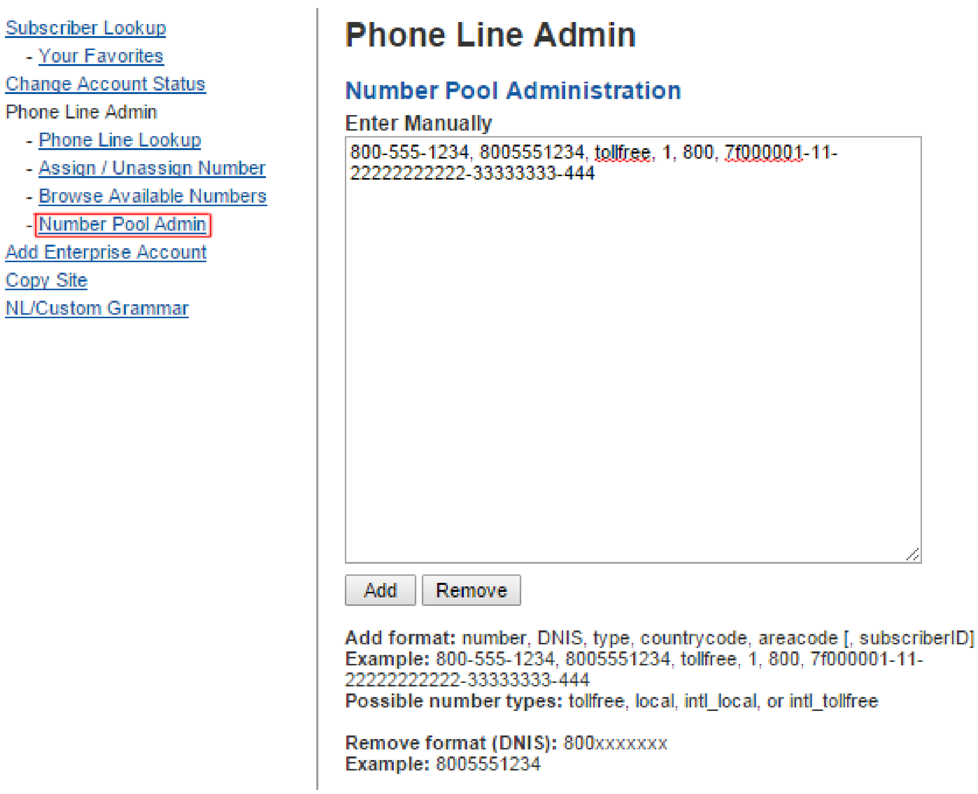
1. In the field, enter e-mail address for the subscriber's account.
2. Click **Suspend** or **Un-Suspend,** depending on the scenario:
   - **Suspend**—Suspends the subscriber account.
   - **Un-Suspend**—Reactivates (Un-suspends) the subscriber account.

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.



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)

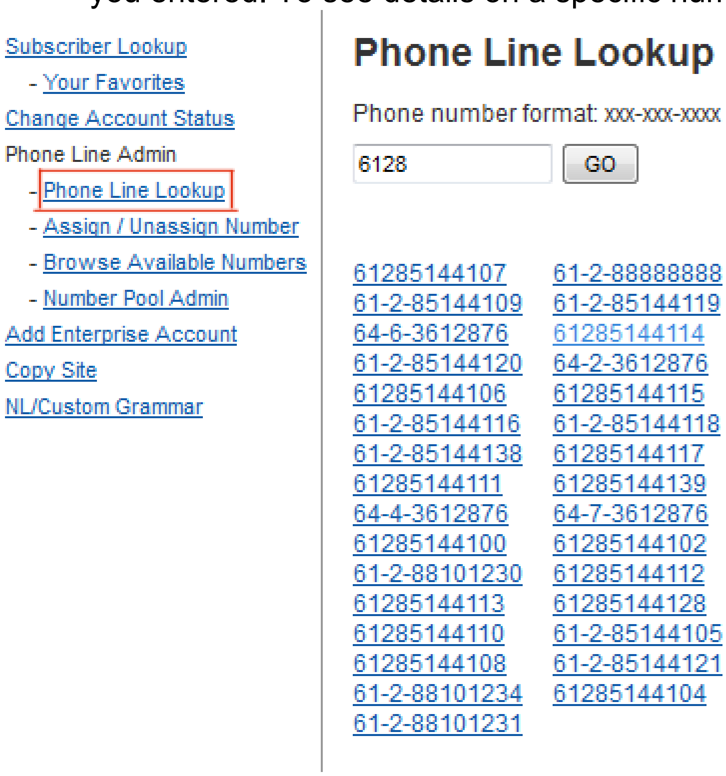
- `type` (example: tollfree)
- `countrycode` (example: 61)
- `areacode` (example: 800)
- `subscriberID` (example: 7f000001-11-22222222222-33333333-444)

- **Possible number types:**
  - `tollfree`
  - `local`
  - `intl_local`
  - `intl_tollfree`
- **Remove format (DNIS):** `800xxxxxxx` (example: 8005551234)

Searching for Phone Numbers

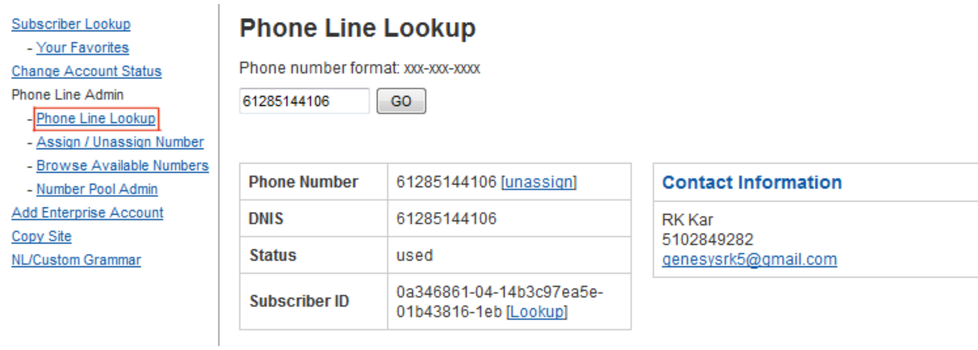
Use **Phone Line Lookup** to search for existing phone numbers. In the Phone number field, enter all or part of a number and click **Go.**

- 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.



Phone Lookup Results - Partial Number Search

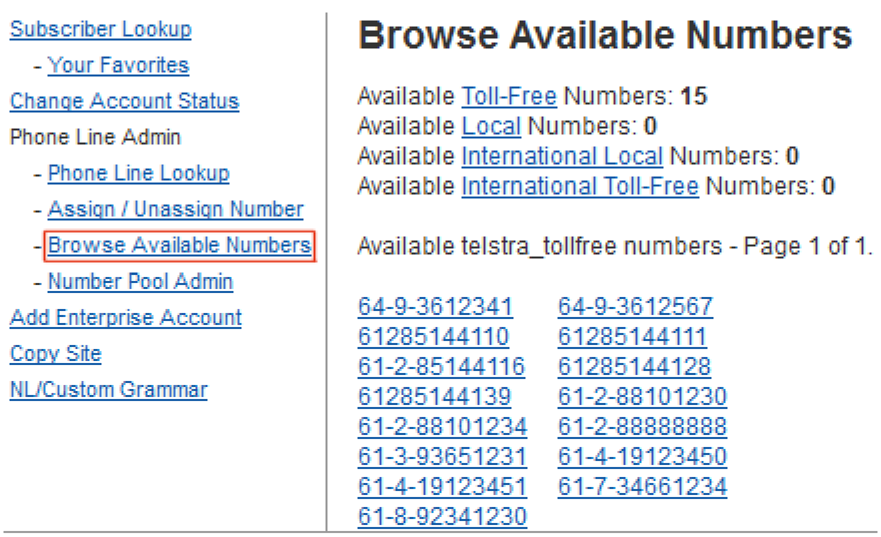
- If you entered a specific and complete number, the tool returns a screen providing details about that number.



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



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.

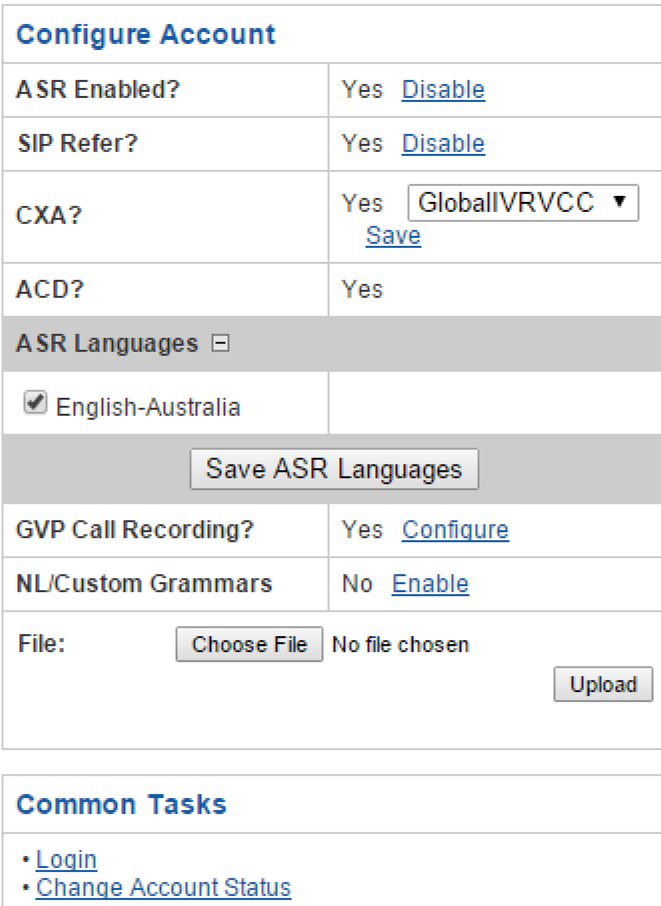
Assigning or Unassigning Phone Numbers

> **Important**
>
> Before you can assign a phone number/DID to a subscriber, you need to add the number to the pool first, as described in the Adding Phone Numbers section.

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



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.

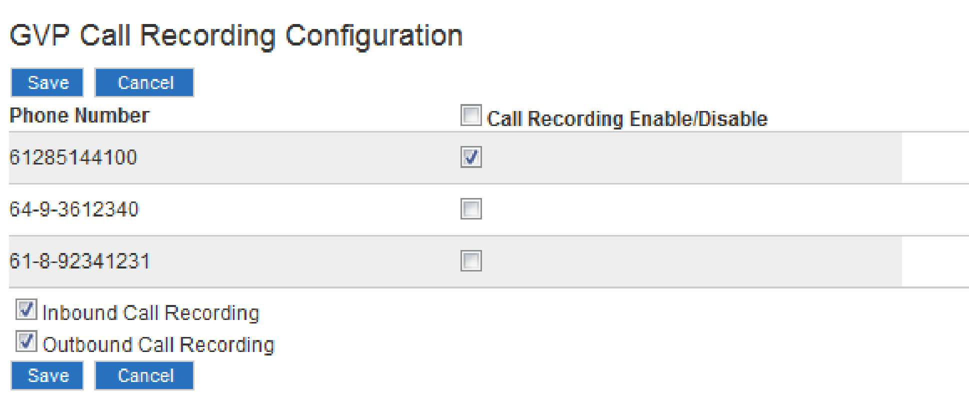
- **SIP Refer** —Leave as **No,** as this is not supported.
- **CXA** —click **Enable** and select **GlobalIVRVCC.** CFA provides three options in the drop-down menu:
    - **GlobalIVR**—Only IVR-related reports are enabled on the **CX Analytics** tab in CX Builder.
    - **GlobalVCC**—If a subscriber 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).
    - **GlobalIVRVCC**— 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



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.

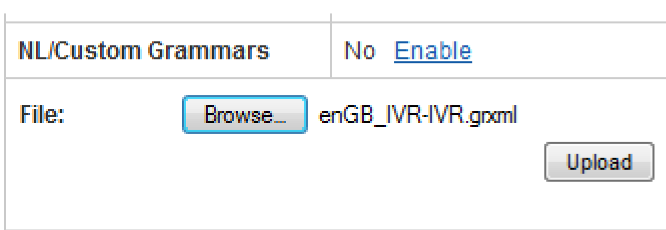
Important

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



Subscriber - Custom Grammar Upload

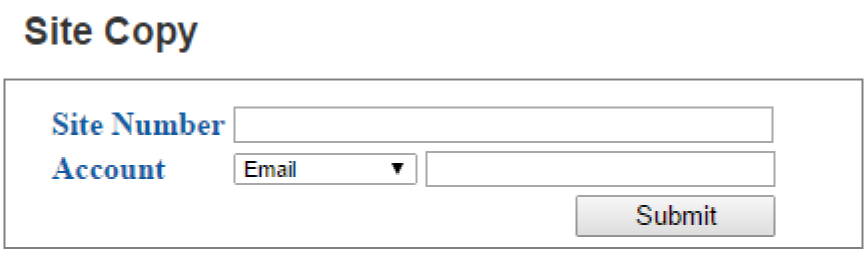
A grammar is a file with words and patterns of words identified that can be used by the speech recognizer as it listens to a caller's response. If you want to use a natural language custom grammar, you can upload one or more to your account.

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

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



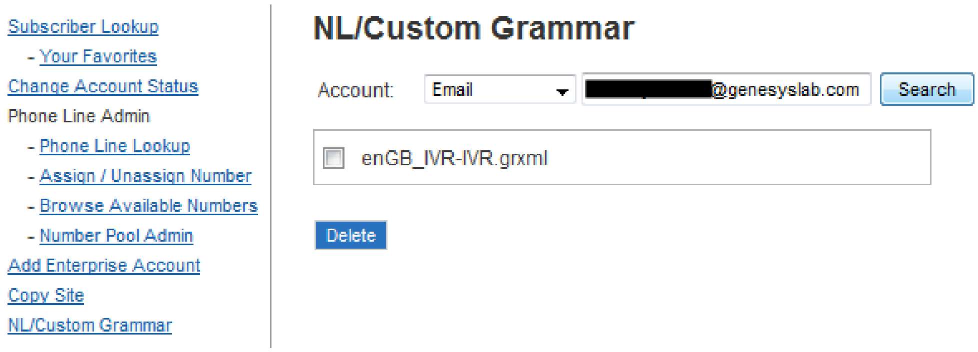
Copy Site Feature

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



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.