Genesys

CSR User Guide

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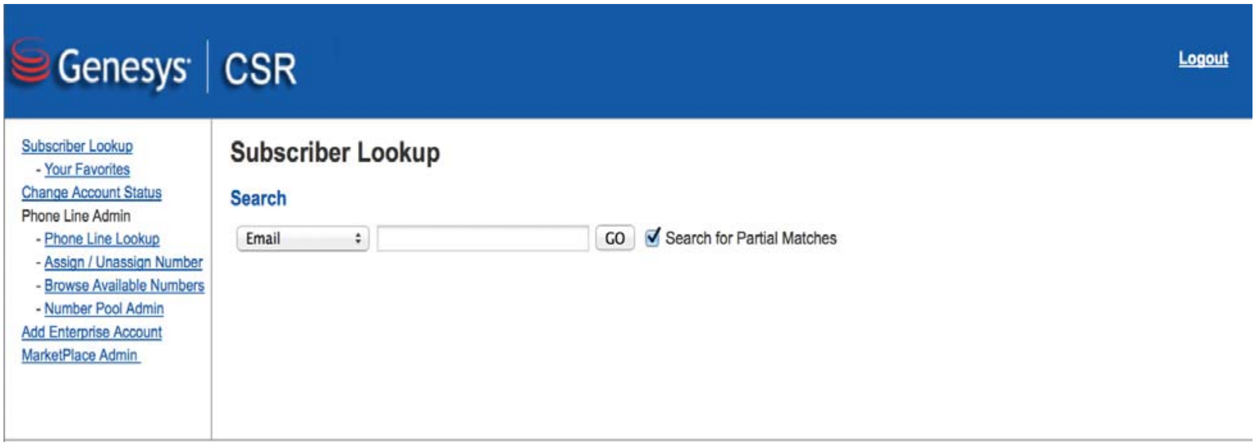
1 Introduction

This document captures the capabilities within Customer Service Record (CSR) tool, which will allow Genesys and its partners to manage its customers. This tool allows for lookup, create and manage customer's account. It allows managing various features, phone number pool etc.



The tool can be accessed at URL- https://csr.angel.com/admin/CSR/

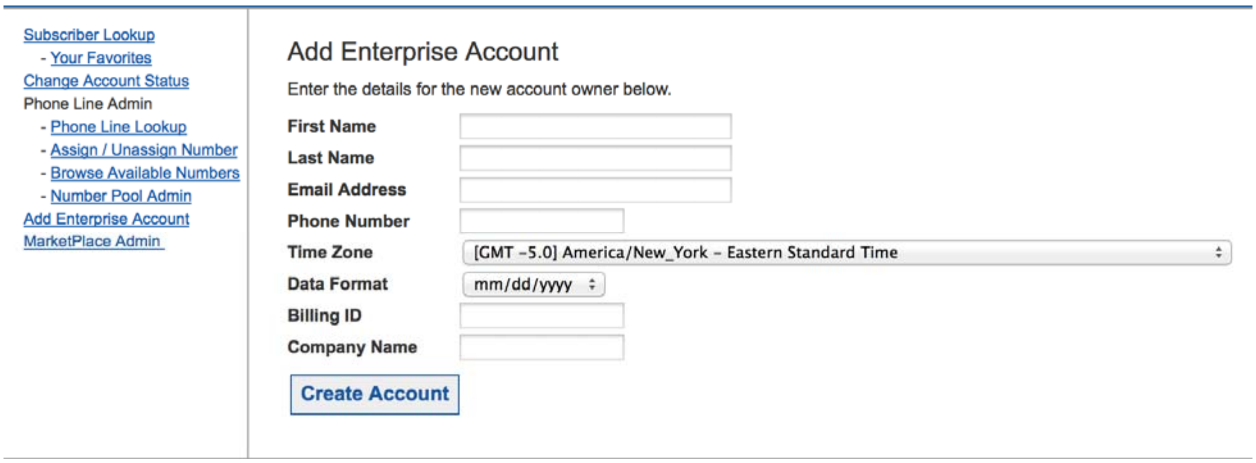
Access to CSR requires a user to have either to be on Genesys network or have Genesys VPN or white-labeled IP Addresses. Prior arrangement has to be made with Genesys to resolve the CSR access. This tool cannot be accessed over open internet.

2 Subscriber Management

An Account is often called Subscriber within CSR tool. So when a new customer Is created/added through this tool, it generate a unique ID, called Subscriber ID.

2.1 Create an Account (Subscriber)

Customer will be able to create a new subscriber through CSR.



User completes the form and click “Create Account” and a welcome email will be sent to email entered prompting the subscriber to complete the account creation process by creating a password, PIN and security question.

Phone Number – Contact phone Number and not the DNIS number assigned to the voice site

Time Zone – Time zone in which customer is located. It supports all global time zones

Date Format – Either of the 2 formats for the account (mm/dd/yyyy or dd/mm/yyyy)

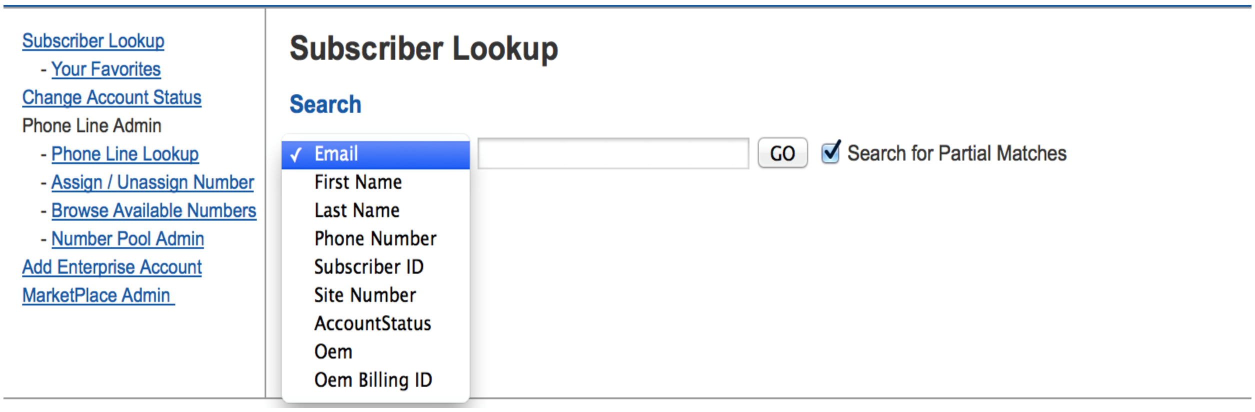
The email address entered will be the users login ID as well as the default contact email address. Billing ID represents the ID used to capture billing data by Genesys or the vendor. Many times it’s a separate tool and this ID is the common key between CSR and billing software. Time zone will be the default time zone in the subscriber’s site builder account. Time zone can be changed at any by the subscriber at any time from CX Builder.

2.2 Lookup an Account (Subscriber)

Customer will be able to lookup an existing customer though a number of options, most common of which are –

a. Email
b. First Name
c. Last Name
d. Phone Number
e. Subscriber ID

f. Site Number



There are additional ways to look for subscribers namely OEM type or Billing ID which is added while creating an account. The Subscriber Lookup Results will return the following information and links:

- Click an "ID" to access Subscriber Details page for that subscriber. The Subscriber Details page is where features are enabled/disabled for subscribers.
- Click a phone number to access the Phone Line Lookup page. The Phone Line Lookup page will display the details of that phone number.
- Click a "Status" to access the Change Account Status page. The subscriber's email address will be pre-populated in the field.
- Click "Login" to access the subscriber's Site Builder account
- Click "Add(+)" to add a subscriber to the CSR user's favorites list

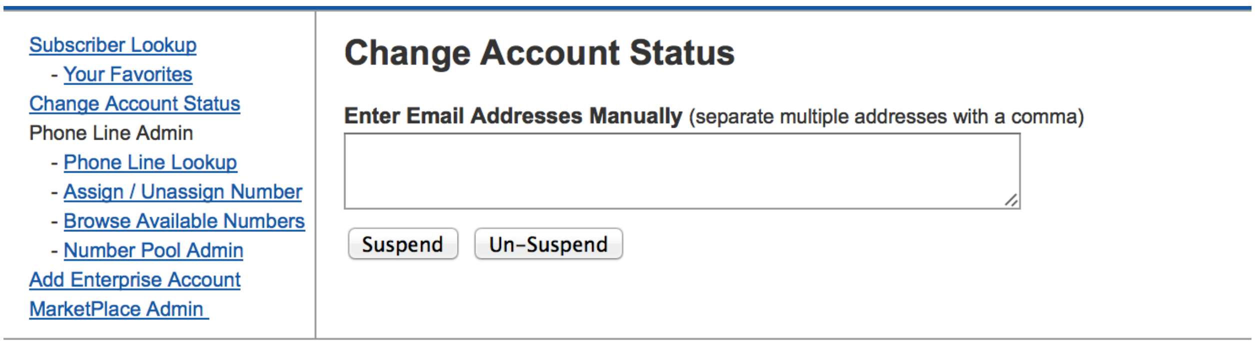
The Subscriber Details page displays the subscriber status, voice sites and phone numbers. The page also allows the CSR user to enable/disable features.

- In the "Voice Site Information" section, click the site name to access that Voice Site in the subscriber's Site 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. This will send 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. At this time, a CSR user can enable ASR Settings, Name/Address Capture, and Salesforce.com CTI access etc for a subscriber. More details below.

2.3 Change Account Status

A customer can be lookup by clicking on ‘Change Account Status’ on the left menu and then its status can be changed based on various business rules.



Various supported statuses are –

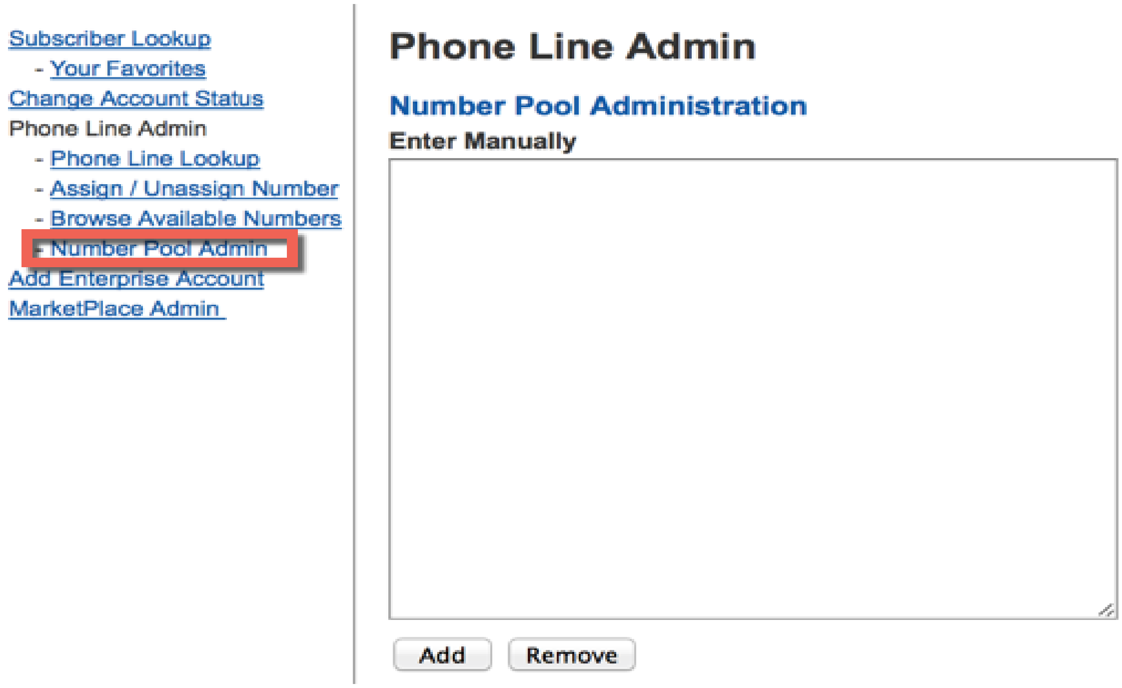
Suspend - Suspends subscriber, must provide new account info
Un-suspend - Un-suspends the subscriber

3 Phone Number Management

The Phone Line section allows the CSR user to add, lookup and manage phone numbers (local and toll-free) and view details about that phone number, such as the DNIS and the subscriber the number is assigned to. Click the “assign” or “un-assign” link to the right of the phone number to access the “Assign/Un-assign Phone Number” page.

3.1 Add Phone Number

CSR User can add phone numbers to a pool of numbers, which will be available to all customers. Customers can see these phone numbers into CX Builder and add it into their account.



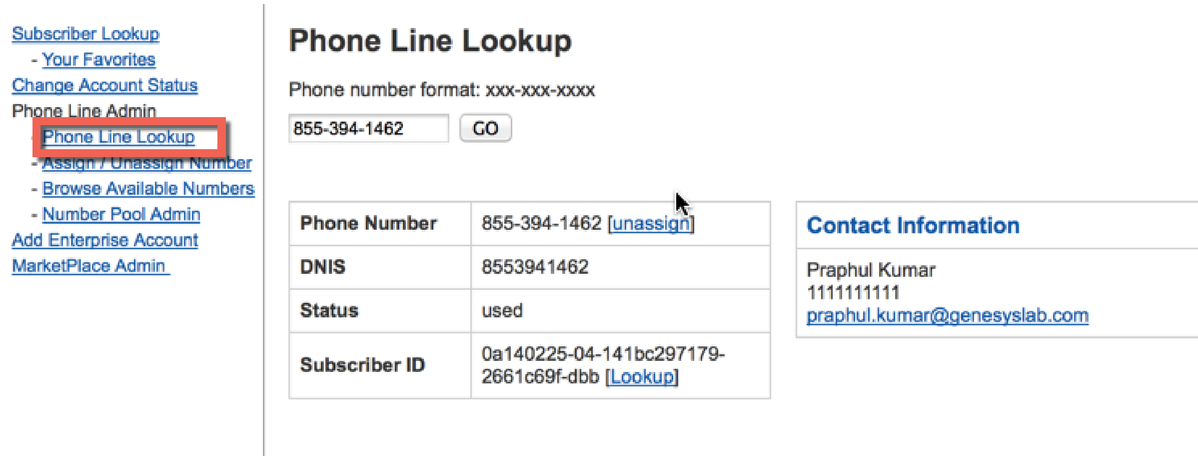
In order to enter a phone number, phone numbers should be added into following format

Add format: number, DNIS, type, countrycode, areacode
Example: 800-555-1234, 8005551234, tollfree, 61, 800
Possible number types: tollfree, local, intl_local, or intl_tollfree

Remove format (DNIS): 800xxxxxxx
Example: 8005551234

3.2 Lookup Phone Number

CSR User can lookup an existing phone number by clicking on 'Phone line Lookup'



CSR provides information on whether phone line is assigned or not and to which account.

3.3 Assign/Un-assign Phone Number

Once a phone number has been lookup, it can be assigned to an account if available or unassigned from an account.

Click the "assign" or "un-assign" link to the right of the phone number to access the "Assign/Un-assign" the Phone Number.

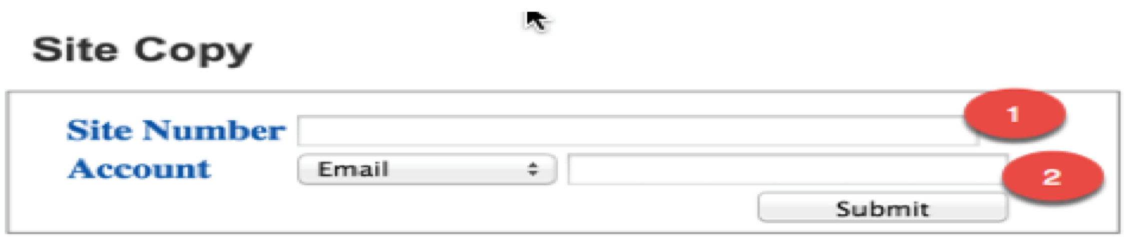
4 CX Builder Feature Management

When an account is looked up, CSR User can click on the “ID” of the subscriber to view and manage features enabled for the account. Following are the features which can be enabled or disabled here –

a. ASR Enabled – Ability to leverage speech input in the voice site. Once enabled, CX Builder users will be able to create voice sites using Speech (and DTMF too).
b. SIP Refer - Ability to transfer calls as Bridge Transfer. Once enabled, this option (transfer type) will be available in the Transfer Page of CX Builder as transfer type.
c. Name Address – Deprecated
d. CFA – Once CF is enabled, CSR User needs to select one of the 3 options from dropdown
    a. IVR – Only IVR related reports are enabled in CX Analytics tab of CX Builder
    b. IVRVCC – Both IVR and VCC analytics reports are enabled
    c. VCC – If a customer is not paying for CX Analytics but using VCC, we select this option. Under this option, all IVR reports are disabled, and only 4 standard reports are enabled under VCC within CX Analytics.
e. SMS – Once enabled, customers will have SMS voice page enabled.
f. ACD – This will enable VCC2.5.x and higher version of VCC for a customer. Once enabled, this cannot be disabled for the given customer though CSR.
g. Outbound – Voice sites can be enabled to take calls triggered by Outbound Rest APIs.

5 Ability to Copy applications across accounts

CSR user can copy a voice site from one account to another within an OEM. Login into the source account and capture the unique voice site number.



Then select the ‘Email’ or ‘Subscriber ID” from the dropdown menu and provide the target email/Sub ID where you want to copy the application. Hit on Submit and specified site will get copied.

6 Miscellaneous

Following capabilities/features can be enabled for an account but requires support from Genesys.

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