InteractionSync

Agent Guide - v1.4

For InteractionSync 2.92 & above

Contact center: Genesys Cloud

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CX Optimized

Contents

1 About InteractionSync

InteractionSync for Genesys Cloud integrates Genesys Cloud with Microsoft Dynamics 365, linking all your organization's communications with the power of Dynamics 365.

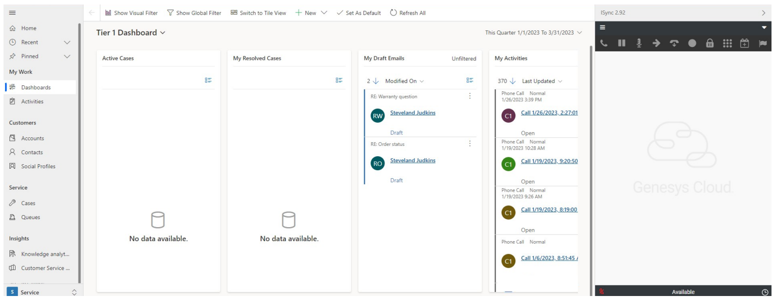
The Genesys Cloud client resides on a sidebar of your Dynamics 365 layout and can handle around 85% of most agent-related actions.

While the interface is one of the most visible features of InteractionSync, the real power comes from the automated screen pop and activity creation built within. InteractionSync intelligently searches Dynamics 365 for the proper contact, lead, or account to pop. Once the interaction is started, InteractionSync automatically creates an activity in Dynamics 365 and associates it to whatever record you want it to.

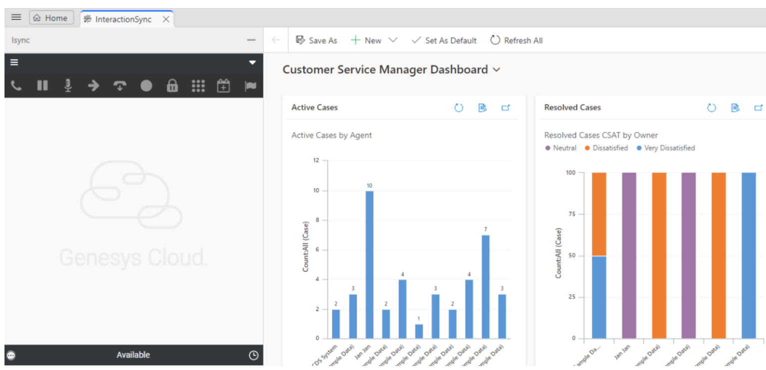
2 InteractionSync for Agents

An integrated view of the Genesys Cloud is presented within the D365 interface. InteractionSync will appear on the right or left side of the interface depending on the CIF and D365 application being leveraged.

Sales Hub



Omni-Channel

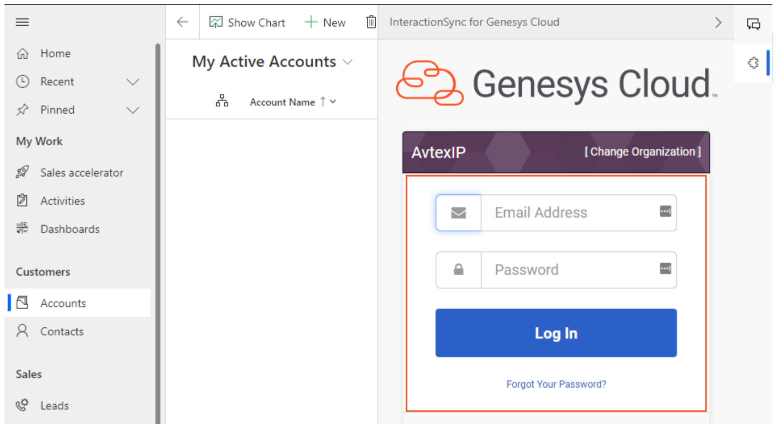


2.1 Sign Into Genesys Cloud

Upon signing into Dynamics 365, you will have to login into Genesys Cloud. Ensure all cookies are enabled in the browser and also microphone is accessible.

1. Select your organization.
2. In the Genesys Cloud CTI phone, enter your **Email address** and **Password** associated with the Genesys Cloud account.

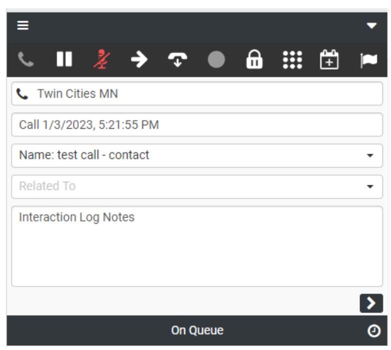
3. Click **Log In** to continue.



Note: Once logged in, a WebRTC Phone window pops up. Do not close the window for better functionality.

2.2 Interaction Log

To ensure, the interaction details are available to track an activity for future reference, the **Interaction Log** feature is used during or after the interaction .



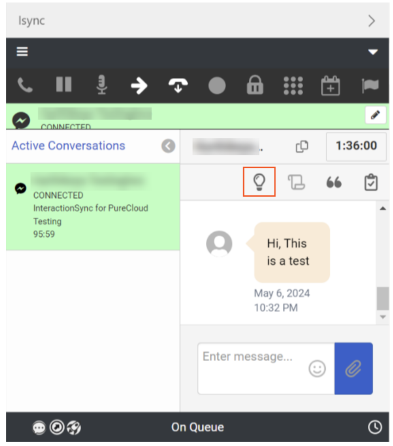
The below options can be filled in for the activity:

- **Name**: Contacts of the customer.
- **Related to**: Drop-down list to select the related objects related to the interaction.
- **Notes**: Enter any notes you want to include that details the interaction.

2.3 Agent Assist

Agent Assist feature only supports Voice, Facebook, WhatsApp, Web Messaging, and Email interaction types. Agent Assist feature with a bulb icon is introduced to provide real-time suggestions during customer interactions.

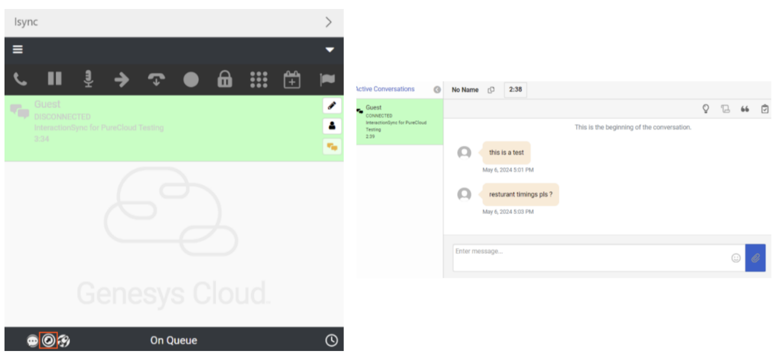
Upon accepting an interaction, the bulb icon is displayed along with the other icons in the embedded interaction window.



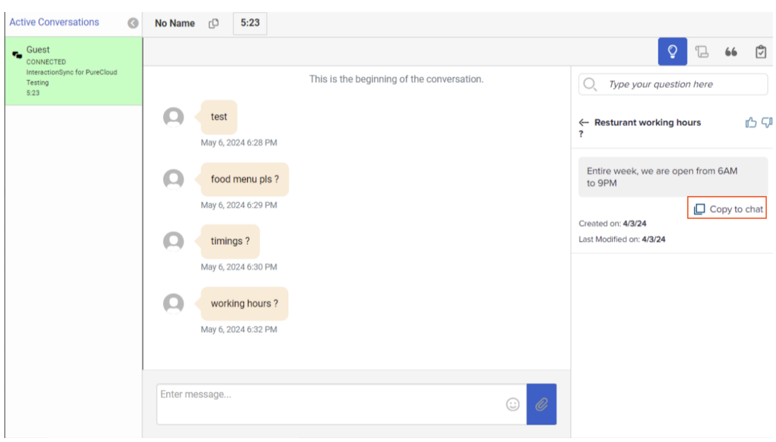
Click the pop out icon, located in the agent's status bar for the embedded window to pop out. It allows to view the auto suggestions during the interaction.

Notes:

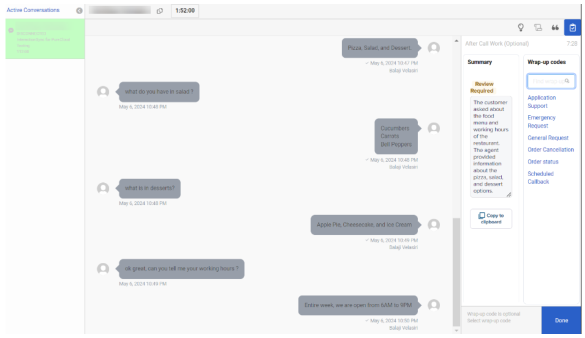
- Email interaction don't support auto suggestions. Agents must manually enter the information in the search field for suggestions.
- Auto suggestions' compatibility with voice interactions varies depending on the accent.



Agents can copy suggestions to the chat window, by clicking the **Copy to Chat** button.



Once the interaction is disconnected, Agent Assist provides the summary of the interaction and can be copied manually to the notes.



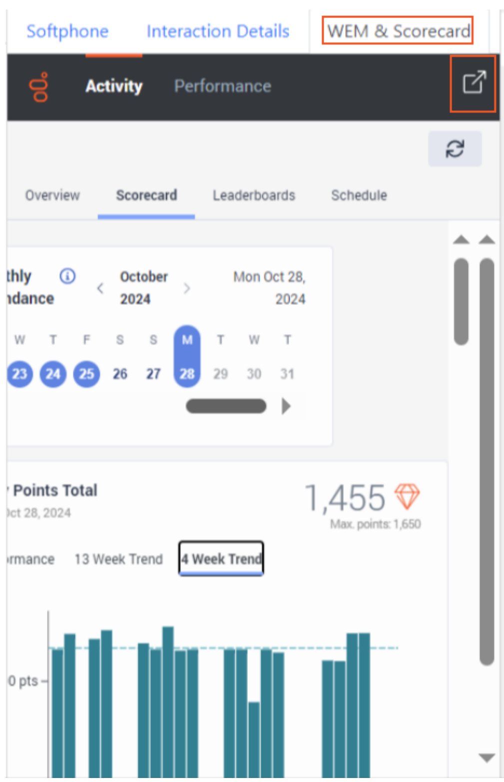
2.4 WEM Widget and Scorecard summary

WEM widget and the scorecard summary offer valuable insights into agents' performance metrics and real-time data. Data is retrieved from Genesys Cloud and displayed in ISync. Enables agents and managers to monitor schedules and provide a comprehensive overview of performance.

To access the WEM report, click the full client icon in the top corner of the softphone.

Notes:

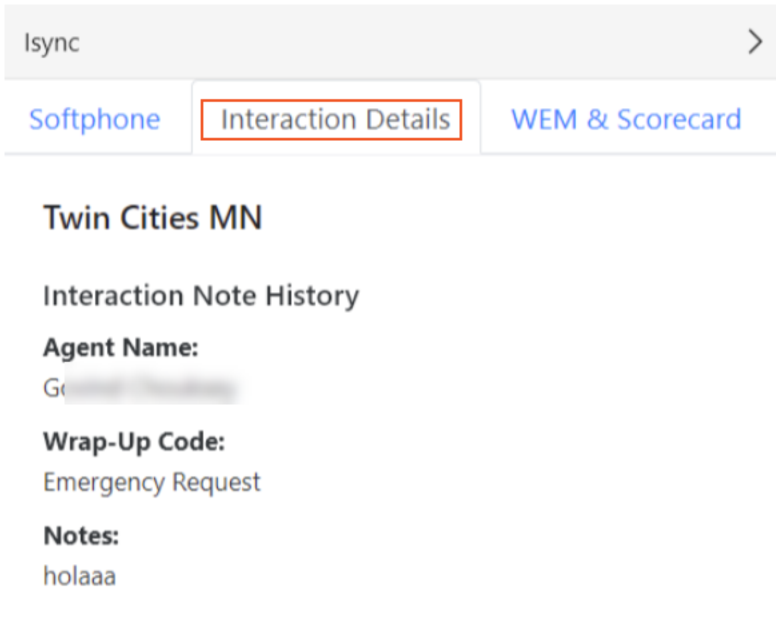
1. Admins must enable the WEM tab on the configuration page for it to appear on the ISync softphone.
2. The WEM tab on the ISync softphone displays data only if the agent has the necessary Genesys permissions; otherwise, it stays blank.



2.5 Interaction Details

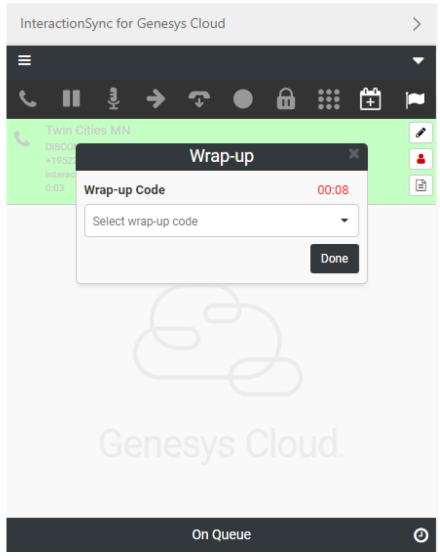
Important: Admins must enable the Interaction Details setting available in the TabViews tab of the configuration page for it to appear on the ISync softphone.

When an interaction transfers to another agent, the wrap-up details are displayed in the Interaction Details tab for the second agent to review.



2.6 Wrap up

After an interaction is disconnected, the display controls change to manage the after call work. The Wrap-up timer is displayed and a code is available in the drop-down for an agent to select. Once the applicable code is selected, click **Done**.



2.7 Screen pop

Screen pop is a mechanism that automatically opens a specific page in Dynamics using existing information or data attached to an incoming interaction. Screen pops assists by "popping" the related page automatically eliminating a cumbersome manual search.

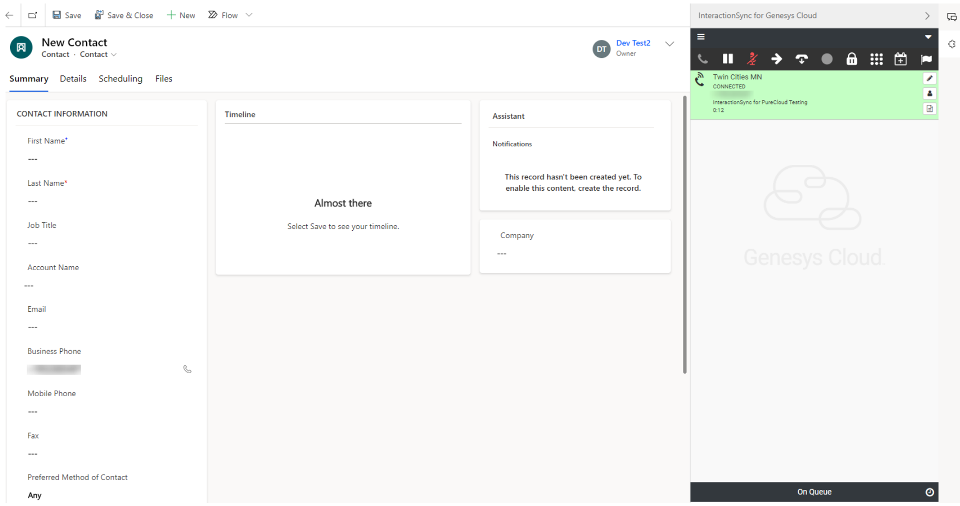
- Out-of-the-box screen pop functionality is provided so there is no extra configuration necessary.
- Custom screen pops can also be configured by applying attributes, or ‘participant data’ to the interaction.

Upon receiving or accepting an inbound interaction, InteractionSync searches for associated entities in Dynamics 365. The corresponding Dynamics record is then displayed, or if nothing is found a new record can be created.

A configured entity displays the customer's contact information, account details, cases related to the account, Leads or notes left by the previous agents about the customer.

2.7.1 New entity

A new entity is created when no information pops up associated with the interaction. Basic information can be gathered from the customer while handling the interaction, and then the information can be saved into Dynamics.



To create a new entity:

1. Enter the mandatory fields like **First Name** and **Last Name** in the contact information.
2. If required, basic contact information will be presented to the new entity form by InteractionSync.
3. Click **Save**.

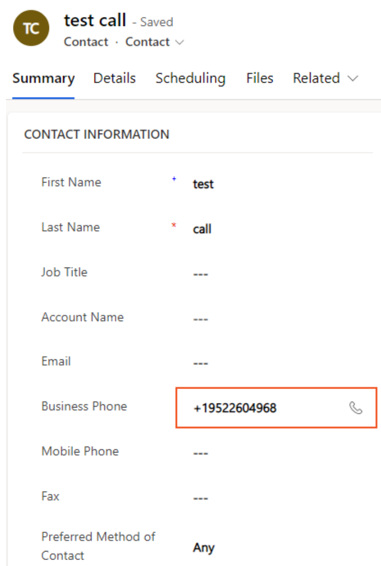
Once saved, the information is available in Dynamics365 for future agents that may receive an interaction from this contact.

Note: When the agent updates an existing unsaved entity, it saves automatically without a pop-up message. A pop-up appears only when the agent updates a new contact or account.

2.8 Click to Dial

InteractionSync for Genesys Cloud supports **Click To Dial** feature allowing agents to click customer's contact number from within the displayed entity.

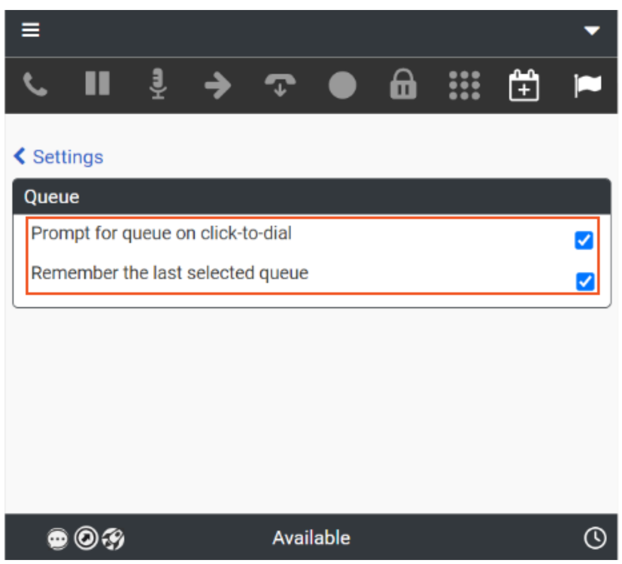
Note: Outbound Queue ID is populated by default if the system admin has set a default in the InteractionSync Configuration page.



2.8.1 Outbound on Behalf of Queue

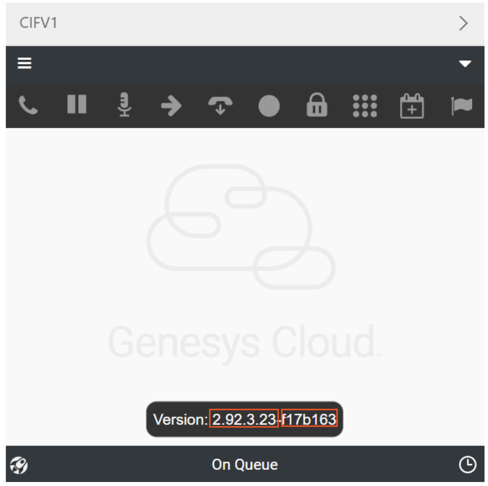
If the Genesys Cloud setting "Prompt for queue on click-to-dial" is enabled, the CTI phone frame requests the queue selection before proceeding with the call. For more information, see https://help.mypurecloud.com/articles/configure-click-to-dial/.

Note: If you want to send interactions on behalf of the same queue, before sending your first interaction, select the **Remember the last selected queue** check box.

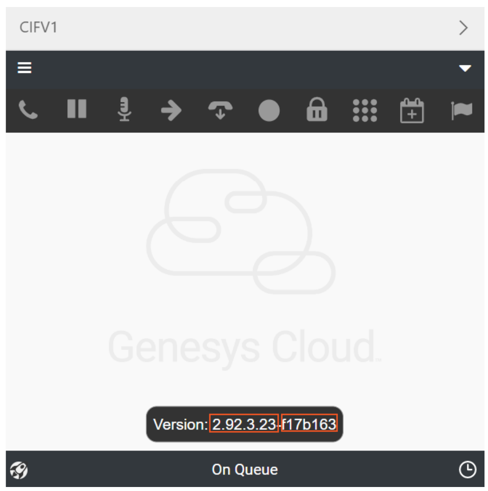


2.9 Version Reporting

A rocket icon is introduced to display the release version of the application, in the agent bar status section. Upon clicking the icon, a pop-up with the release details will appear on the InteractionSync softphone.



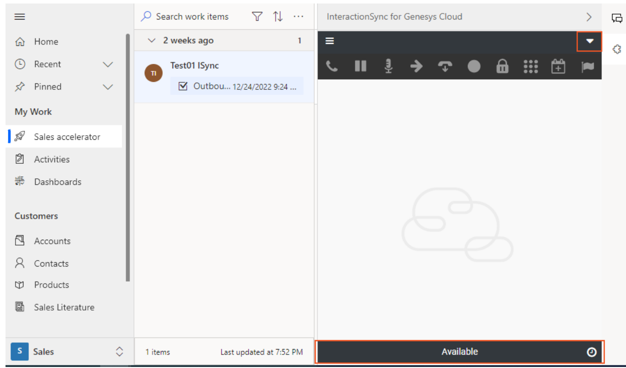
As part of the release version displayed, two information types are presented. The first part is a **Dynamic CRM solution** and the second is a **Sidebar** version.



Note: The rocket icon will appear next to any embedded icons that are visible on the agent status bar.

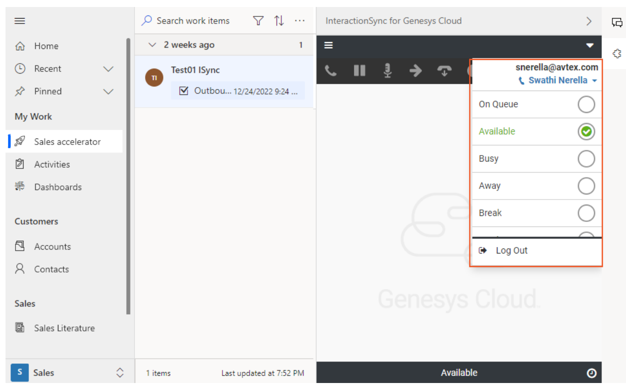
2.9.1 Agent Status

The status of the agents represents your current activity for the interactions to handle. A timer indicating the duration of the current state is also shown in the Genesys Cloud pane.



Changing status

The status can be changed depending on your activity, using the drop-down menu available in the InteractionSync interface.



Note: Statuses available in Genesys Cloud can be customized depending on your organization.

3 Call interactions

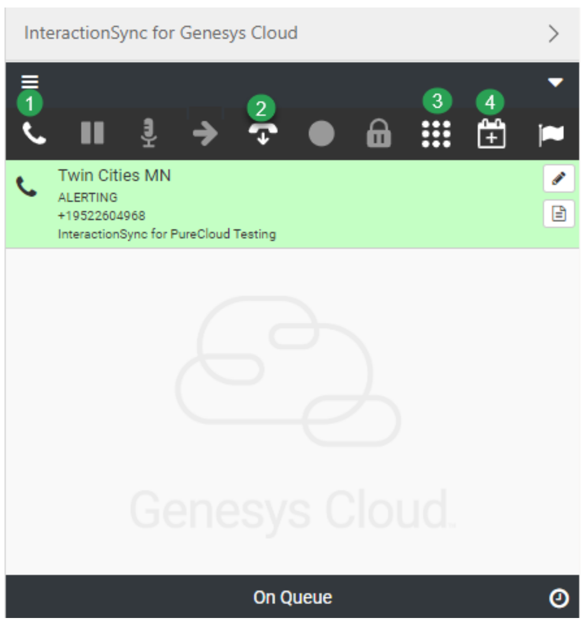
When an incoming call is received, you will see the alert in the InteractionSync pane. Interactions can be accepted or rejected utilizing the call controls.

Note: To receive a call, the OnQueue status must be selected. A Screen pop will either appear when an interaction is presented or accepted(depending on configuration settings) to an agent, displaying the existing information attached with the interaction or a new one can be created. See *Screen pop* for more information.

3.1 Receive an interaction

An incoming alert appears in the InteractionSync pane. The following controls are available when a call is received.

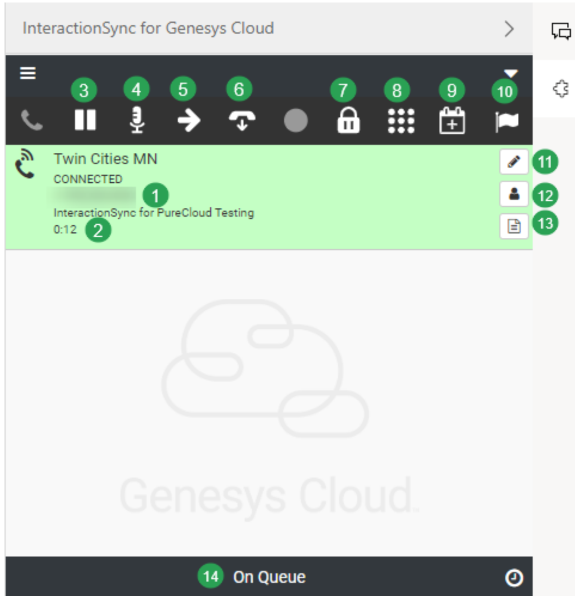
Note: When an incoming alert appears, the complete queue name is not displayed.



1. **Pick Up:** Click to accept the interaction.
2. **Disconnect:** Ends the interaction. See *Reject an interaction*
3. **Keypad:** Provides entry of account numbers related to the call.
4. **Schedule a callback:** Allows the agent to schedule a callback. See *Schedule a Callback*

3.2 Accept an interaction

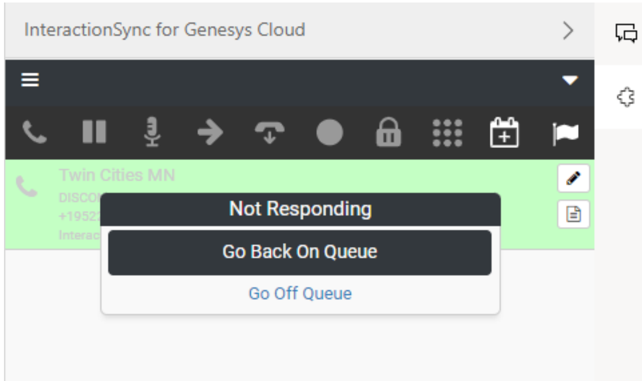
When a call is accepted, the display controls change to manage an accepted call.



1. **Customer number:** Shows the customer's phone number.
2. **Timer:** Displays the amount of time the interaction is connected.
3. **Hold:** Places a call on hold and retrieves the call when clicked again.
4. **Mute:** Mutes the call. Can toggle between mute and unmute.
5. **Transfer:** Transfers the call between available queues and agents. See *Call Transfer*
6. **Disconnect:** Ends the call.
7. **Secure Pause:** Allows the recording of an interaction to be paused. A customer can still be heard, but the conversation is not recorded when Secure Pause is enabled.
8. **Keypad:** Provides entry of account numbers related to the call.
9. **Schedule a callback:** Allows the agent to schedule a callback. See*Schedule a Callback*
10. **Flag Voice Quality Issue:** Checks the quality of the call when having issues.
11. **Interaction Log:** Allows the agent to add notes during the call and track activity for future reference. The agent can update the log up to two minutes after the call is disconnected. See *Interaction Log*
12. **Wrap up:** Click for the drop-down to select a wrap up code for the call. See *Wrap up*
13. **Script:** The script associated to the interaction is accessible via the CTI panel.
14. **Agent state:** Determines the current agent's status. See *Agent Status*

3.3 Reject an interaction

When an incoming call is rejected or not answered, the call gets disconnected and the display controls change to manage a rejected call.

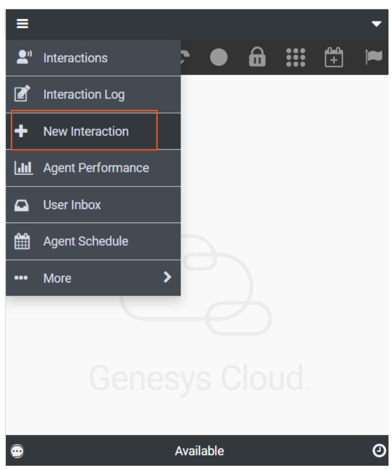


The option is presented to go back on queue or go off queue.

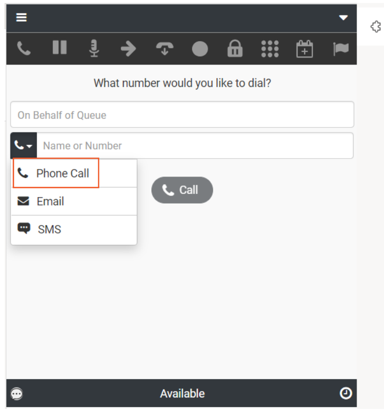
3.4 Make an Outbound interaction

InteractionSync for Genesys Cloud provides the ability for the agents to place an outbound call to the customer.

1. Select the hamburger icon located on the top left side of the Genesys Cloud pane.
2. Go to **New interaction**.



3. Select **Phone Call** from the drop-down.



4. Interaction to a customer can be placed in two ways:
   - **On Behalf of Queue**: Enter the desired queue and search for name or number you want to place an interaction to.
   - **Directory search**: Enter a phone number or a contact, using the directory search.
5. Click **Call**.

Result: The interaction is placed. Once connected, the display controls change accordingly and a screen pop entity related to the customer's information appears.

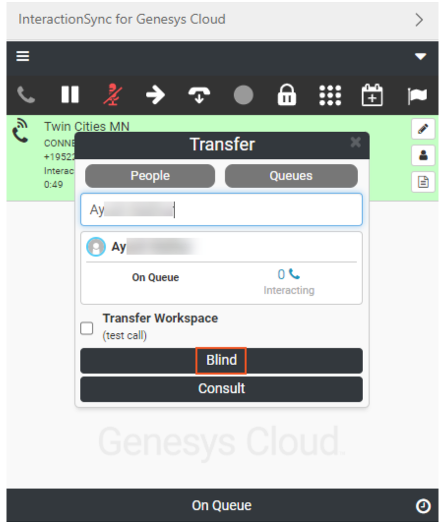
3.5 Call Transfer

A call can be transferred as Blind or Consult. For both options, the transfer is done within the InteractionSync pane. You can transfer the call either to an agent or a queue.

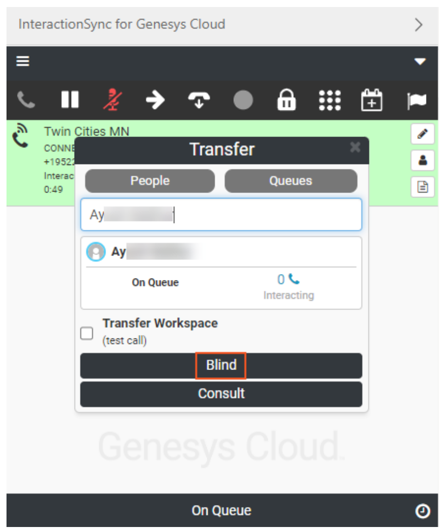
3.5.1 Blind Transfer

You can transfer the call directly to other agent or queue without informing them.

1. Click the **Transfer** button, after the call is picked up. Select **People** or **Queues** option and type in a Name or Number to start a search.



2. Click **Blind** to transfer the call directly.



Note: You will need to select the **Transfer Workspace** option in order for the recipient to receive workspace along with the call when transferred.

3. Once done, proceed to **Wrap up**. See *Wrap up* for more information.

3.5.2 Consult Transfer

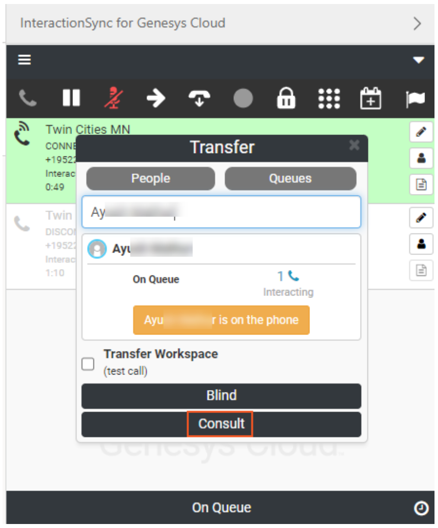
A call is transferred, after speaking to the third party.

1. Click the **Transfer** button after the call is picked up. Select **People** or **Queues** option and type in the Name or Number to start a search.
2. The third party's status is shown prior transferring the call.

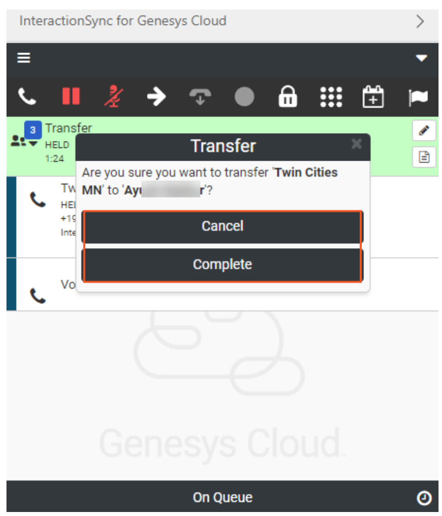
3. You will need to select the **Transfer Workspace** option in order for the recipient to receive workspace along with the call when transferred.

   Note: The Transfer workspace options is available only for an existing entity.

4. Click **Consult**.



   Result: The participant is placed on hold and the display controls change to mange a transferred call. You will have the options to **Cancel** or **Complete**.



5. Click **Cancel** to end the call transfer or click **Complete** to transfer the call to the consulted participant.

6. Proceed to *Wrap up*

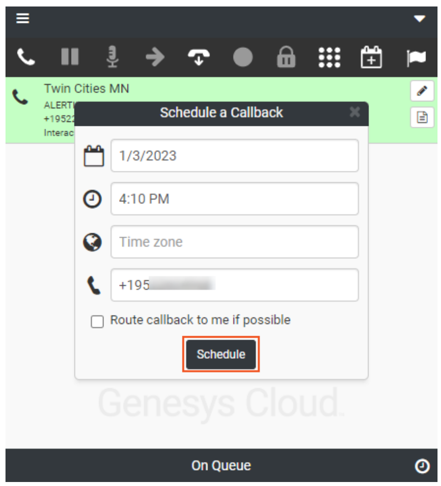
3.6 Schedule a Callback

A callback can be scheduled on a callback interaction or a phone call interaction.

To schedule a call back:

1. Click the **Schedule a Callback** button that is available when handling a call or when a call is placed to an agent.
2. Fill in the appropriate details for the callback:
   - **Date**: select or type in the date.

     Note: A callback cannot be scheduled for more than 30 days in future.
   - **Time**: select the time of the callback.
   - **Time zone**: select the time zone.
   - **Phone number**: enter the phone number that contact prefers for callback.
   - **Route callback to me if possible**: Select to route the callback to yourself. If this option is not selected, the call is directed to the next available agent in the queue.



3. Click **Schedule**.

   Result: At a scheduled time, the agent receives an alert about the call.

3.7 Post Call Survey

A post-call survey is automated and conducted after a call. It is designed to gather feedback from customers. The purpose is to collect information about the quality and whether the customer's needs were met.

Note: You must have this feature configured by your administrator to be available.

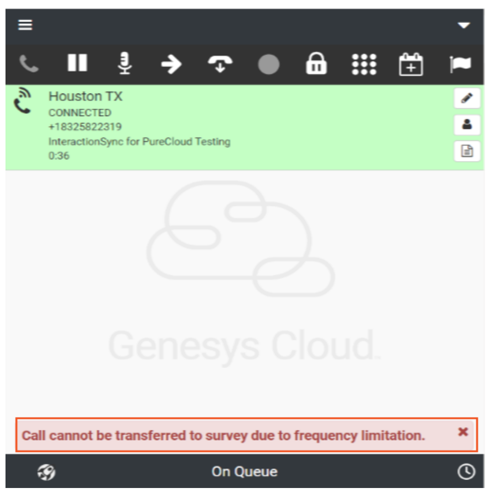
Upon connecting a call, the agent will have a smiley icon displayed next to the embedded icons that are visible on the agent status bar.

Once the call is complete, the agent will need to click on the smiley icon to transfer the call to post call survey.

Survey Frequency

Important: Agent must be assigned **InteractionSync for Genesys Cloud User** role, to have the survey feature option available.

Based on the survey frequency set by the admin, agents can transfer the call interactions to a post call survey via the survey frequency setting. If the call is sent to a survey more than once within the specified interval, an error will be triggered.



Note: If the call is routed to a survey but the caller drops the call before connecting to the survey, an error message **Failed to transfer interaction** is displayed.

3.8 Agent Scripts

An agent script is a predefined and customer specific set of instructions that guides agents during phone interactions. It typically includes prompts for handling various scenarios, responses to common questions, and steps to follow for specific processes.

Agent scripts appear in the softphone embedded window during phone call interactions.

Important: Admins must enable this setting on the configuration page for the agent scripts to appear.

4 Callback interactions

When a callback is placed, the display controls change to manage the callback interaction. The alert will be seen in InteractionSync pane.

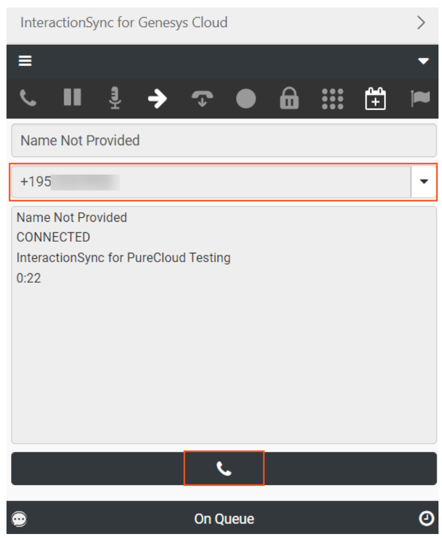
When an agent responds to the callback, the following controls will be available:

- Transfer the call to a queue or agent. See *Blind Transfer*
- A callback can be rescheduled. See *Schedule a Callback*

4.1 Respond to a callback interaction

An alert appears in the InteractionSync pane when the callback is scheduled. Respond to the callback:

1. Click on the phone icon or choose phone number from the drop down to call the customer.



   Result: The call gets connected to the customer.

2. Once the call is connected the display controls work the same as a phone call interaction.
3. Proceed to *Wrap up* and click **Disconnect** to complete the interaction.

Note: Once the call is disconnected, agent must also disconnect the callback alert.

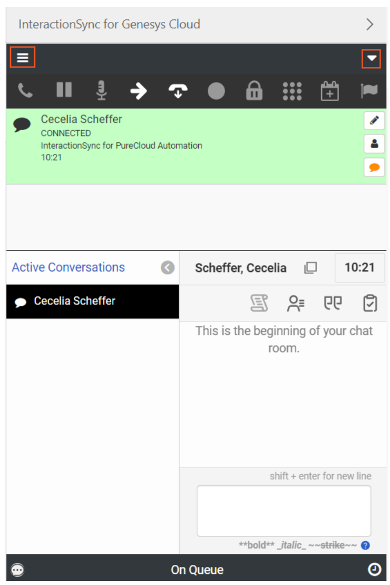
5 Chat interactions

When a chat is sent to an agent, an embedded chat window opens up in the InteractionSync pane. A Screen pop will either appear displaying the existing information attached with the interaction or a new one can be created. See *New entity* to create a new one.

The chat interactions open up in a new browser window, if the embedded feature is not enabled by your administrator. Up to three different chat interactions can be handled simultaneously.

Notes:

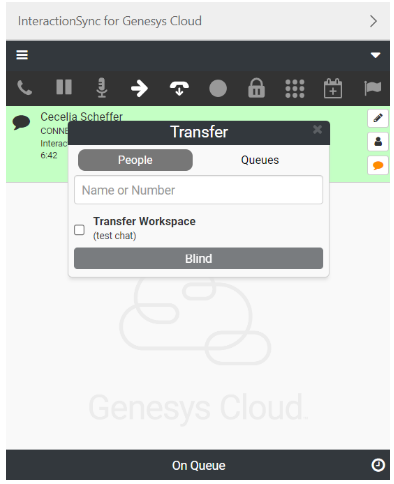
- When the embedded chat is open, the menu and drop-down buttons are not available to be used. This is expected behavior and the buttons can be accessed by minimizing the embedded chat window.
- The embedded chat window minimizes once the interaction is complete.



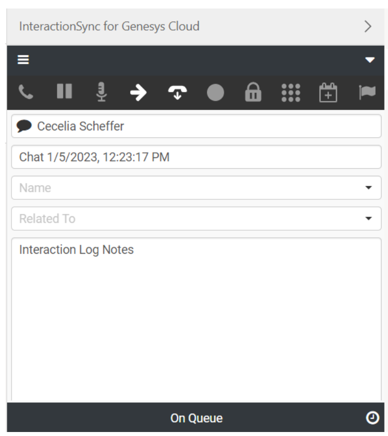
The **Active Conversations** tab in the chat window displays the chats that are currently active in the interaction.

Transfer a chat interaction

Chat interactions only support **Blind** Transfer. A Blind transfer is sent to an agent or queue without notification.



1. Search for an agent or queue and click **Blind** to transfer the interaction.
2. Notes can be added to track the activity for future reference. Refer *Interaction Log* for more information.



3. Once the transfer is done, proceed to *Wrap up*.

   Note: The Transfer Workspace option is available only for an existing entity.

4. Click **Disconnect** to complete the interaction.

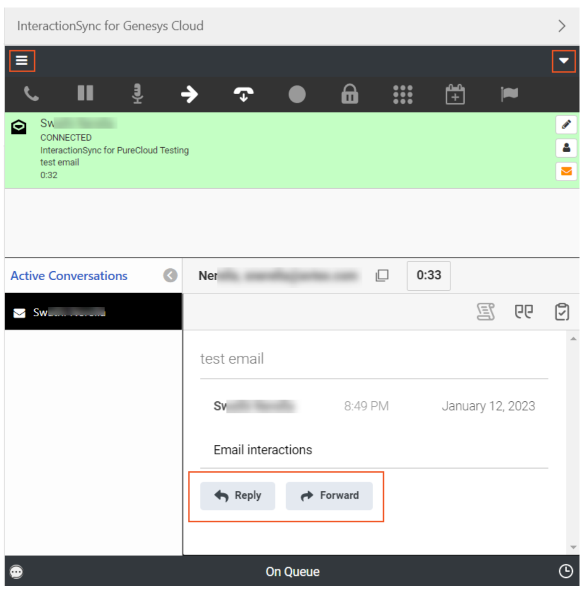
6 Email interactions

6.1 Receive an email interaction

When an email is sent, an incoming alert appears in the InteractionSync pane. A Screen pop will either appear displaying the existing information attached with the interaction or a new one can be created. See *New entity* to create a new one. Once connected, agents can preview an email in the embedded window before responding.

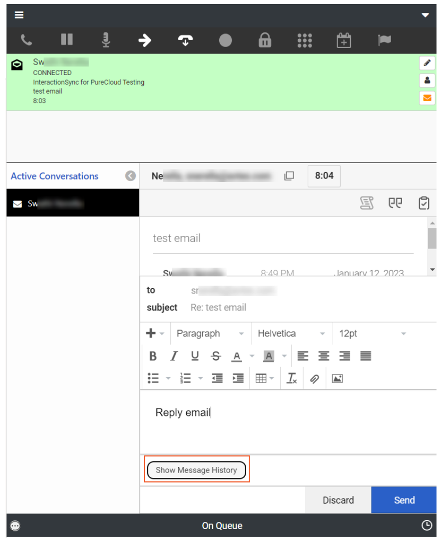
Notes:

- When the embedded email is open, the menu and drop-down buttons are not available to be used. This is expected behavior and the buttons can be accessed by minimizing the embedded chat window.
- The embedded window minimizes once the interaction is complete.



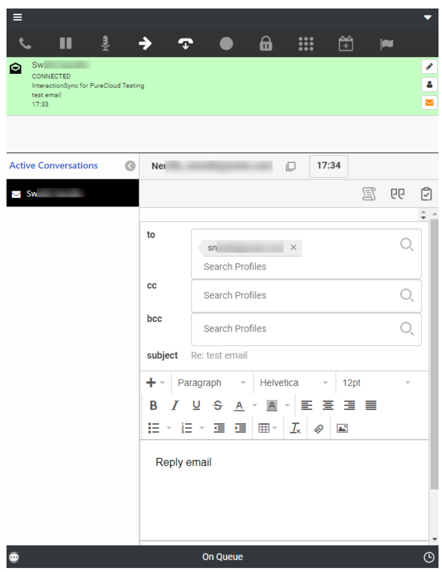
To reply or forward an email, click **Reply** or **Forward**.

Result: A draft email is created.

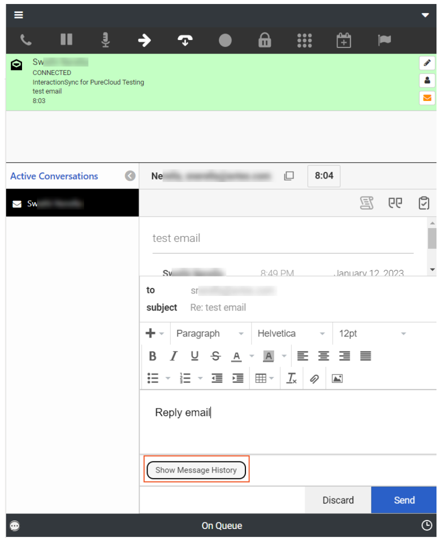


1. In the **To** field, enter the recipient email address. Upon clicking the **To** field, **CC** and **BCC** fields are populated.

   Note: InteractionSync populates email address suggestions, when searched for email address in the fields.



2. Type a message in the draft pane.
3. Click **Show Message History** to include the original message.



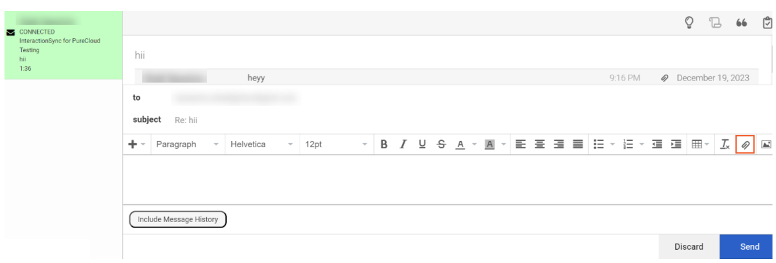
4. Click **Send**. Replying to or forwarding the email message automatically ends the interaction.
5. Proceed to *Wrap up*

6.2 Attach a file to an email

Agents can send attachments in an email.

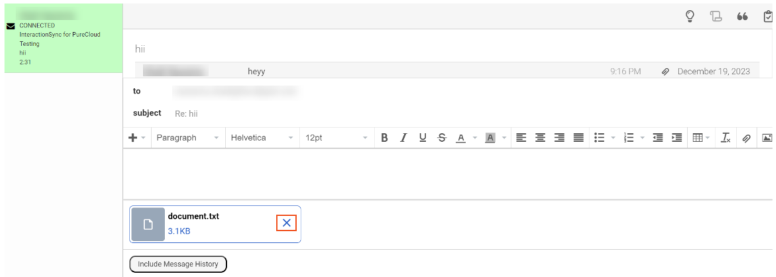
To upload an attachment:

1. Click the **Add attachment** icon in the draft email pane.



2. From the file dialogue window, select the file to upload, then click Open. The file uploads to the draft email. For larger files, a progress bar indicates upload progress. When the upload is finished, the file will appear in the draft email pane.

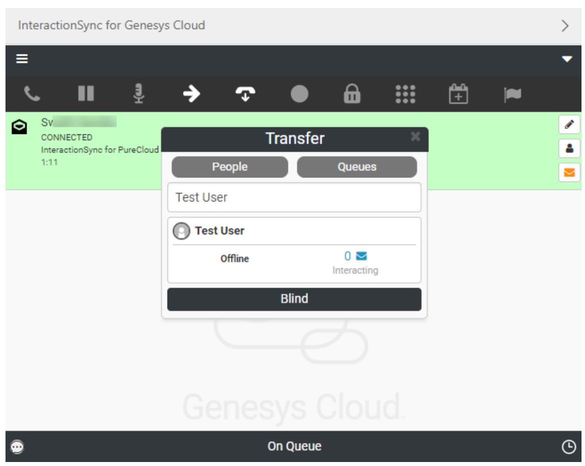
3. To remove an attachment from an email, click the "X" on the attachment.



Note: Email attachments can only be downloaded, not viewed, from the InteractionSync sidebar.

6.3 Transfer an email interaction

Email interactions only support Blind Transfer. A Blind transfer is sent to an agent or queue without notification.



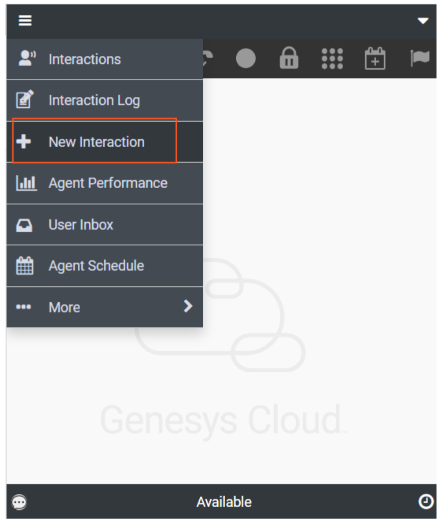
1. Search for an agent or queue and click **Blind** to transfer the interaction.
2. Notes can be added to track the activity for future reference. Refer *Interaction Log* for more information.
3. Click **Blind**. The email is transferred to a new agent.

   Note: The Transfer Workspace option is available only for an existing entity.
4. Click **Disconnect** to end the interaction and proceed to *Wrap up*

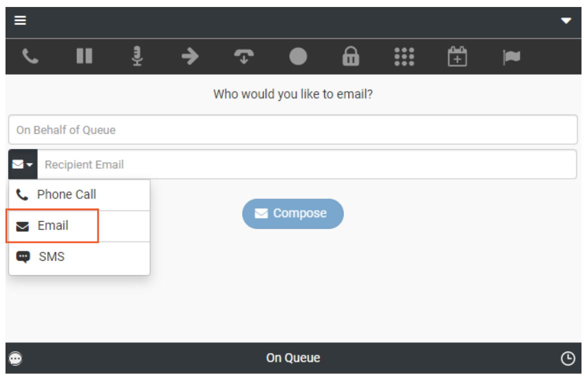
6.4 Make an Outbound email interaction

To place an Outbound email:

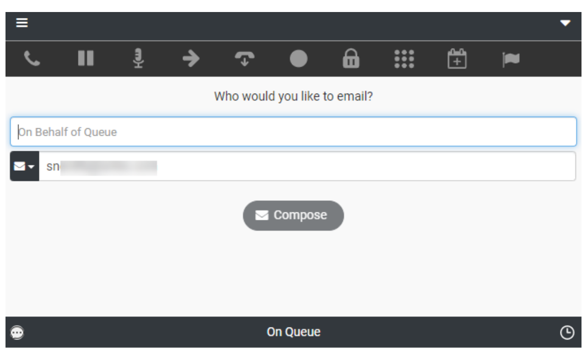
1. Click the hamburger icon located on the top left side of the InteractionSync pane.
2. Go to **New interaction**.



3. Select **Email** option from the drop-down.



4. Select the desired queue by entering the queue name in **On Behalf of Queue** field. InteractionSync populates the available queues.



5. Enter the email address in the **Recipient Email** field.
6. Click **Compose**.

Result: Once the email is sent, the display controls change to manage a received email. A screen pop appears with the information associated with the interaction.

7 Message interactions

InteractionSync for Genesys Cloud supports SMS, Facebook, WhatsApp, Web Messaging, Line and Open messaging interactions from customers.

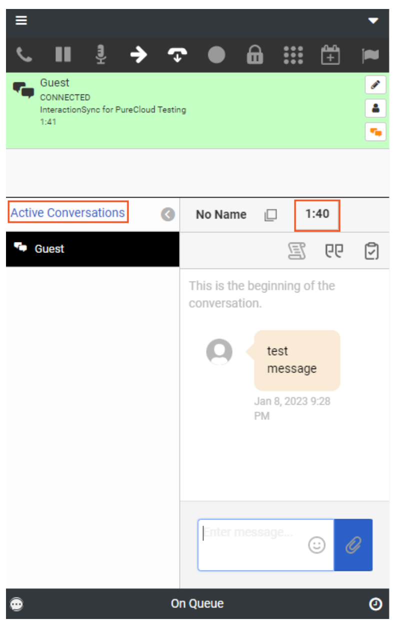
If the interaction is interrupted while handling, and customer tries to restart, it is routed as a new interaction to the agents who are in queue. Chat transcripts from the previous agents will also be included along when its routed.

When an interaction is placed, it alerts in InteractionSync pane like any other interaction.

7.1 Accepting a message

After accepting a message, a new embedded message window opens within the InteractionSync pane. The embedded window minimizes once the interaction is complete.

Notes: The interactions open up in a new browser window, if the embedded feature is not enabled by your administrator.

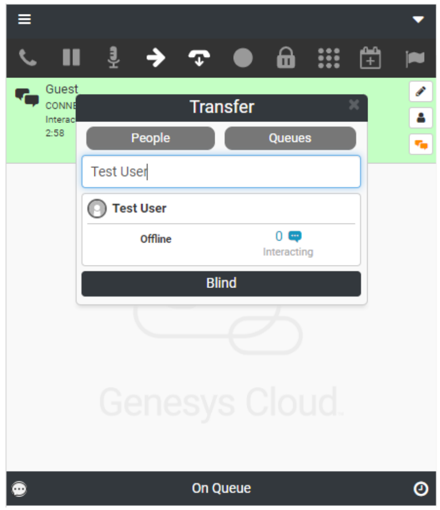


- The embedded window displays the active conversations and the response field. Active conversations reside on the left side of the chat window.
- The interaction timer is located on the top of the response field. It indicates the conversation time between the agent and the customer.

Up to three different chat interactions can be handled simultaneously. When there are multiple interactions open and a new message pops up, a red dot displays next to the message icon. The red dot disappears once the agent responds to the customer.

7.2 Transfer a message interaction

Message interactions only support Blind Transfer. A Blind Transfer is sent to an agent or queue without notification.

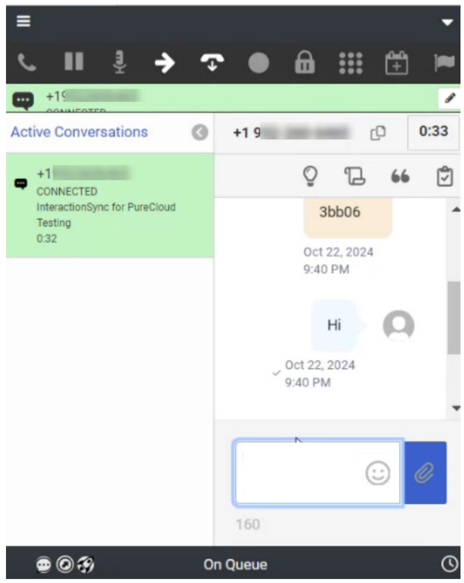


1. Click the **Transfer** button.
2. Search for an agent or queue and click **Blind**
3. The chat is transferred to a new agent.
4. Once done, proceed to *Wrap up*

8 SMS interactions

8.1 Accepting an SMS interaction

After accepting SMS, a new embedded window opens within the InteractionSync pane. The embedded window minimizes once the interaction is complete.



Notes:

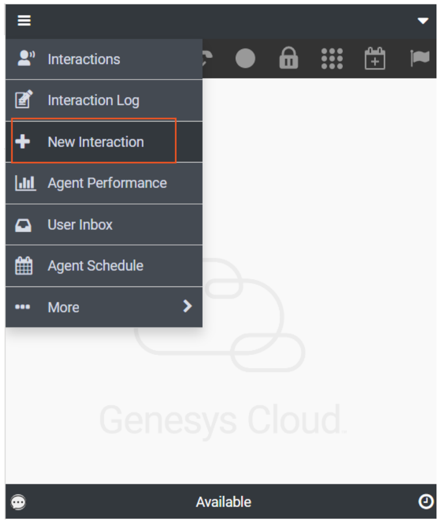
- The interactions open up in a new browser window, if the embedded feature is not enabled by your administrator.
- The embedded window displays the active conversations and the response field. Active conversations reside on the left side of the chat window.
- The interaction timer is located on the top of the response field. It indicates the conversation time between the agent and the customer.

Up to three different chat interactions can be handled simultaneously. When there are multiple interactions open and a new message pops up, a red dot displays next to the message icon. The red dot disappears once the agent responds to the customer.

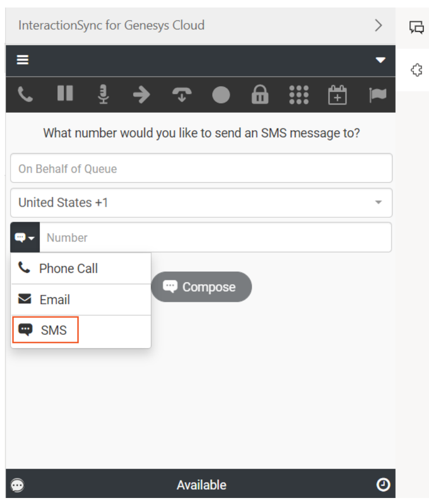
8.2 Make an Outbound SMS interaction

To place an Outbound SMS:

1. Click the hamburger icon located on the top left side of the InteractionSync pane.
2. Go to **New interaction**.



3. Select the **SMS** option from the drop-down.



4. Select the desired queue by entering the queue name in **On Behalf of Queue** field. InteractionSync populates the available queues.
5. Select the country code.
6. Enter the number you want to place the interaction to.
7. Click **Compose**.

Result: Once the SMS is connected, the display controls change to manage a received SMS. A screen pop appears with the information related to the interaction.

9 Appendix

9.1 CIFV1: No warning message displayed when closing the active interaction tab

1. Enable auto answer in Genesys Cloud for the interaction to connect automatically.
2. The agent must not select the "On Queue" status from the InteractionSync sidebar. Instead, the agent must be logged in to "On Queue" status prior to the interaction being connected.
3. Interaction comes in and is connected via auto answer.
4. Duplicate the primary tab with the active interaction in the ISync sidebar.
5. Navigate to the secondary tab and close the primary tab .

Note: No actions or click events are performed by the agents in the InteractionSync sidebar before closing the primary interaction tab.

Result: No warning message appears upon closing the active interaction tab unless a click event or an action by the agent in the InteractionSync sidebar happens, that prompts the warning message to be displayed prior to closing the tab.

10 Revision history

Date	Description of change
November 4, 2024	Added *SMS interactions* section. Added *Agent Scripts* to *Call interactions*. Added *WEM Widget and Scorecard summary* to the Introduction section. Added *Interaction details* to the Introduction section.
May 2, 2024	Added Agent Assist topic to the InteractionSync for Agents section.
December 20, 2023	Updated Email interactions section.
November 27, 2023	Added a warning message to the Appendix.
September 14, 2023	Added Survey frequency feature to post call survey. Added a note in Click to Dial section about the Outbound Queue ID. Added Open messaging to the Messaging interactions.
May 24, 2023	Added Post Call Survey and Notes History sections.
February 23, 2023	Creation of document.