InteractionSync

Agent Guide- v1.2

For InteractionSync 1.82

Contact center: Genesys Cloud

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CX Optimized

Contents

1 About InteractionSync

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

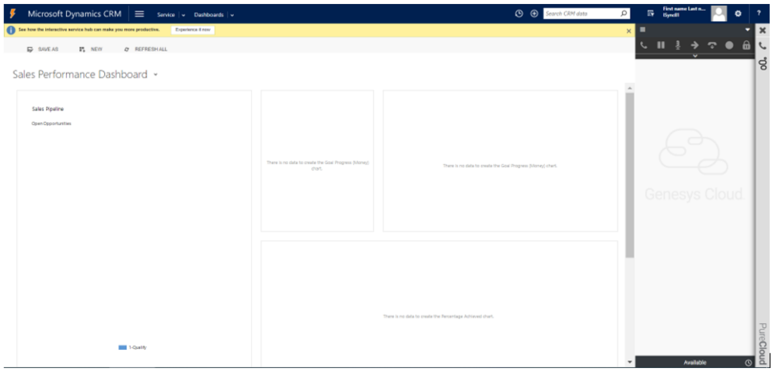
The Genesys Cloud client resides on a sidebar of your Dynamics layout and can handle around 85% of most agent-related actions.

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 for the proper contact, lead, or account to pop. Once the interaction is started, InteractionSync automatically creates an activity in Dynamics 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 Dynamics interface. InteractionSync will appear on the left side of the interface.

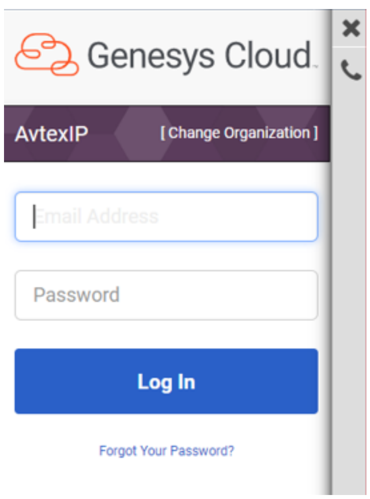
Sales Hub



2.1 Sign Into Genesys Cloud

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

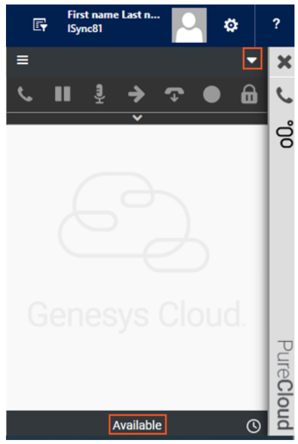
1. Select your organization.
2. In the Genesys Cloud CTI phone, enter your **Email address** and **Password** associated with the Genesys Cloud account.
3. Click **Log In** to continue.



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

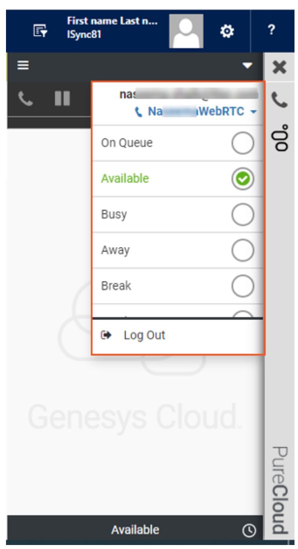
2.2 Agent Status

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

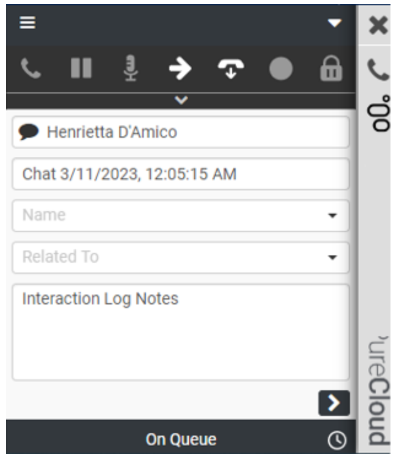
The status can be changed depending on your activity, using the drop-down menu available in the InteractionSync interface.



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

2.3 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.

2.4 Wrapup

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**.

2.5 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.

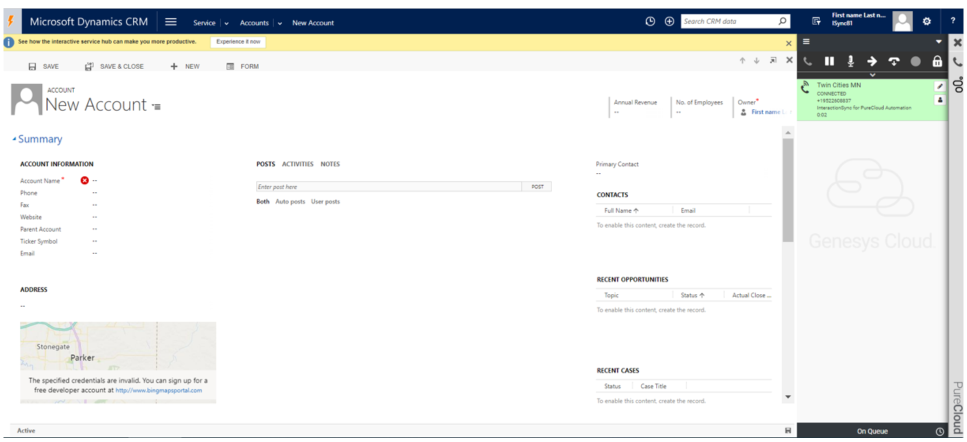
- Out-of-the-box screen pop functionality is provided so there is no extra configuration necessary.
- Custom screen pops can also be configured by applying attributes, or 'participant data' to the interaction.

Upon receiving or accepting an inbound interaction, InteractionSync searches for associated entities in Dynamics. 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.

2.5.1 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:

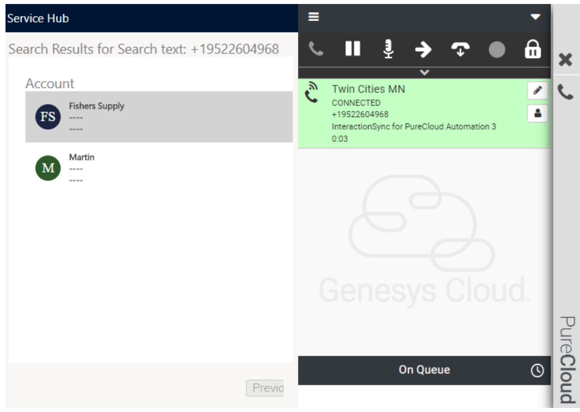
1. Enter the mandatory fields like **First Name** and **Last Name** in the contact information.
2. If required, basic contact information will be presented to the new entity form by InteractionSync.
3. Click **Save**.

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

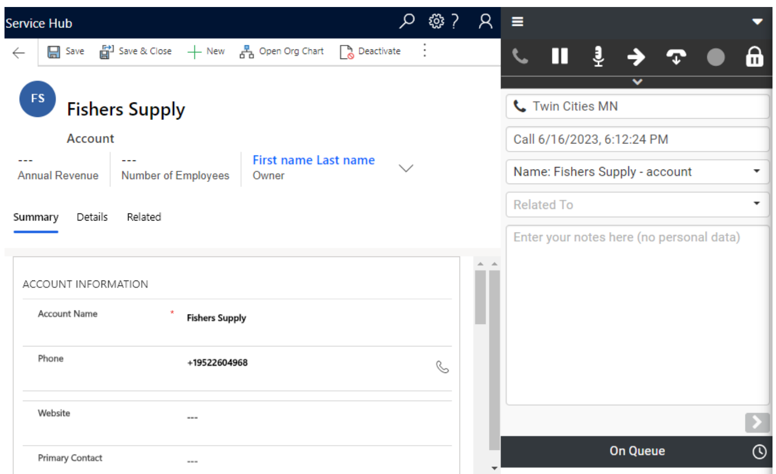
2.5.2 Multiple record interaction

To have the multi-record search on the custom page, admins must configure the feature. When a multiple record interaction happens, a custom page appears with the entities that's related to the interaction.

Note: InteractionSync for on-prem supports only Contact, Account, Lead, Opportunity and Case entities to associate with the side bar.



Agent will need to click on the required entity to associate with the side bar.



3 Call interactions

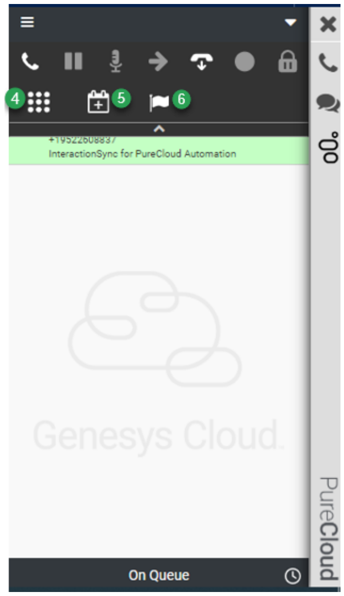
When an incoming call is received, you will see the alert in the InteractionSync pane. Interactions can be accepted or rejected utilizing the call controls.

Note: To receive a call, the OnQueue status must be selected. A Screen pop will appear when an interaction is presented to an agent, displaying the existing information attached with the interaction or a new one can be created. See *Screen pop*.

3.1 Receive an interaction

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

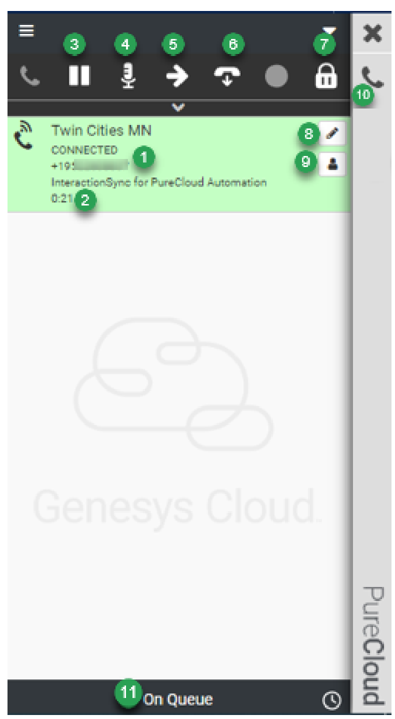
1. **Pick Up:** Click to accept the interaction.
2. **Disconnect:** Ends the interaction. See *Reject an interaction*.
3. **Expand/Collapse:** Click to expand and have more icons visible.



4. **Keypad:** Provides entry of account numbers related to the call.
5. **Schedule a callback:** Allows the agent to schedule a callback. See *Schedule a Callback*.
6. **Flag Voice Quality Issue:** Checks the quality of the call when having issues.

3.2 Accept an interaction

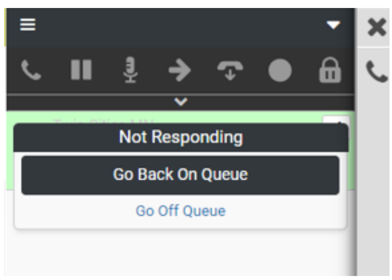
When a call is accepted, the display controls change to manage an accepted call.



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. **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*.
9. **Wrap up:** Click for the drop-down to select a wrap up code for the call. See *Wrapup*.
10. **PureCloud Mini Client:** Click to maximize the side bar.
11. **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.

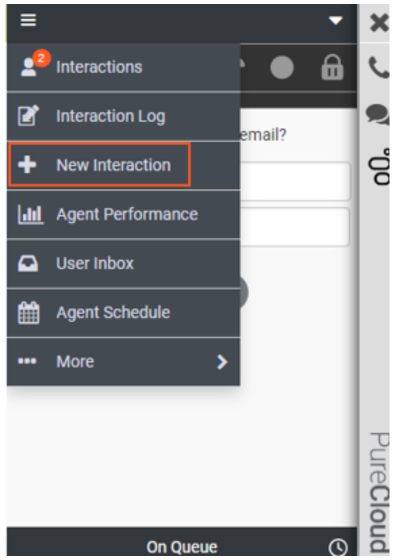


The option is presented to go back on queue or go off queue.

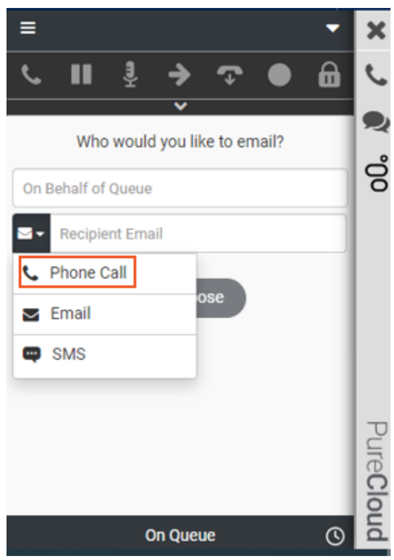
3.4 Make an Outbound interaction

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

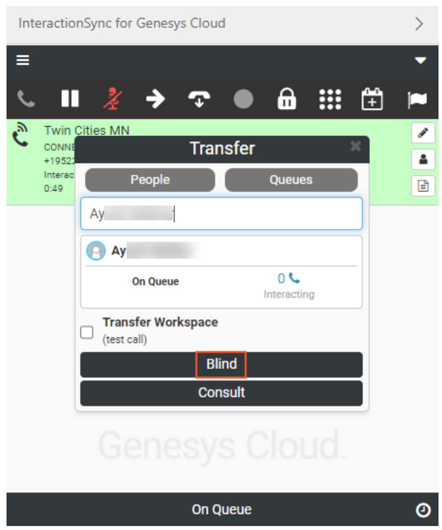
A call can be transferred as Blind or Consult. For both options, the transfer is done within the InteractionSync pane. You can transfer the call either to an agent or a queue.

Note: Screen shots may differ slightly from the customer's environment.

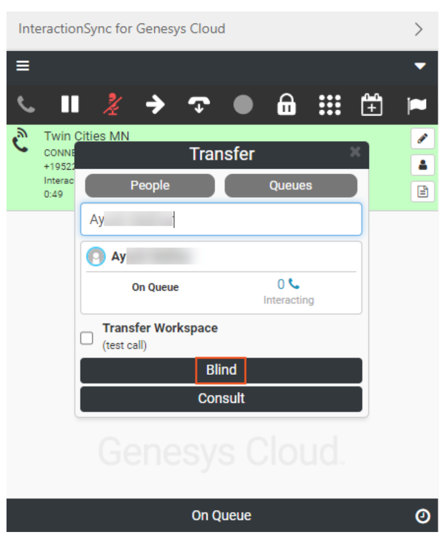
3.5.1 Blind Transfer

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.

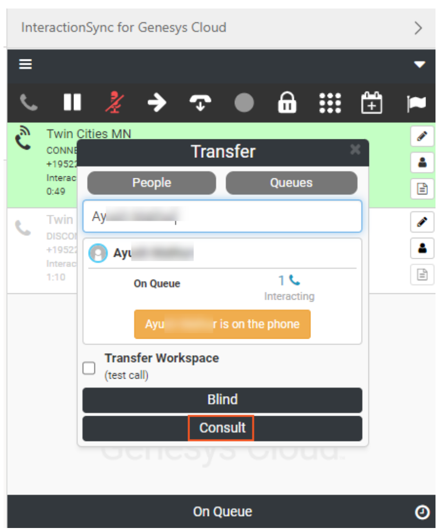
3. Once done, proceed to **Wrap up**. See *Wrapup*.

3.5.2 Consult Transfer

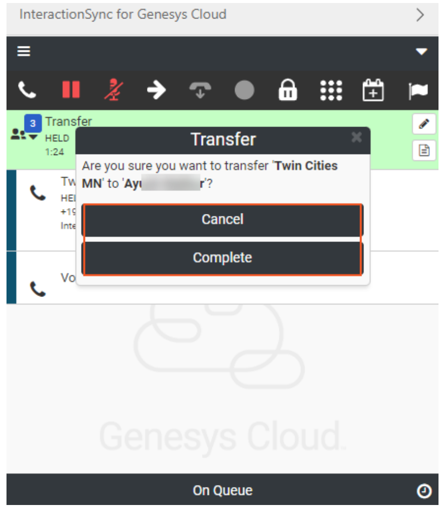
A call is transferred, after speaking to the third party.

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 *Wrapup*.

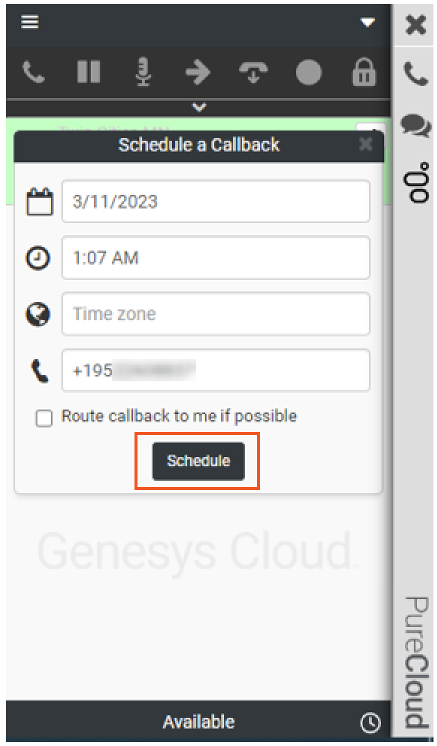
3.6 Schedule a Callback

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.

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.

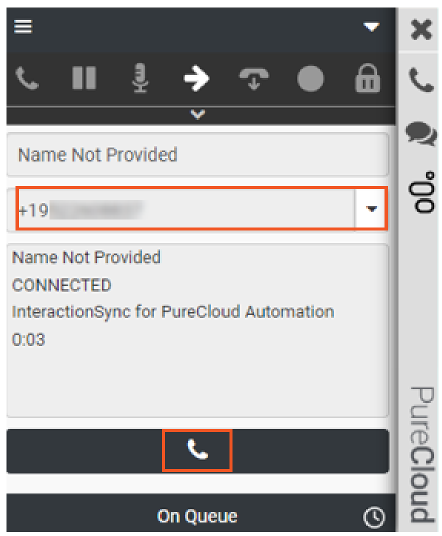
When an agent responds to the callback, the following controls will be available:

- 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 *Wrapup* and click **Disconnect** to complete the interaction.

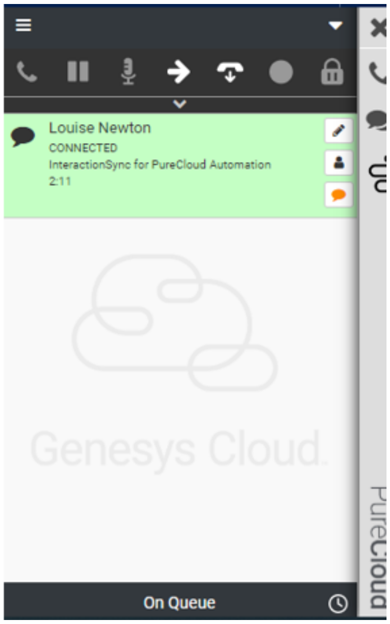
Note: Once the call is disconnected, agent must also disconnect the callback alert.

5 Chat Interactions

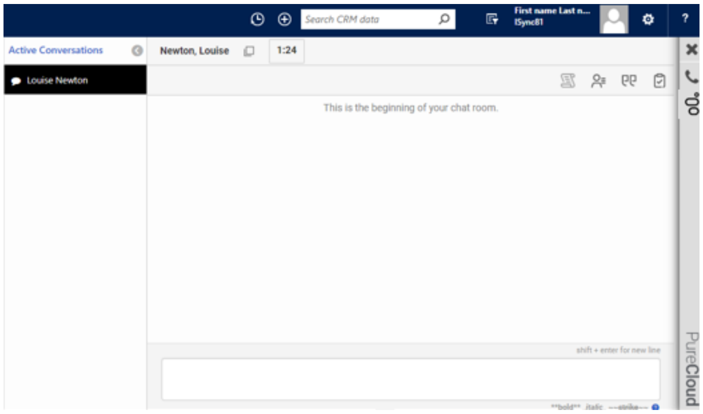
When a chat is sent to an agent, an embedded chat window opens up in the InteractionSync pane. A Screen pop will either appear displaying the existing information attached with the interaction or a new one can be created. See *New entity*.

Notes:

- The chats 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.

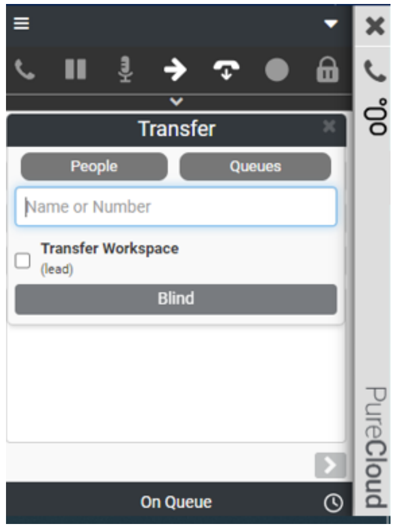


The **Active Conversations** tab in the chat window displays the chats that are currently active in the interaction.

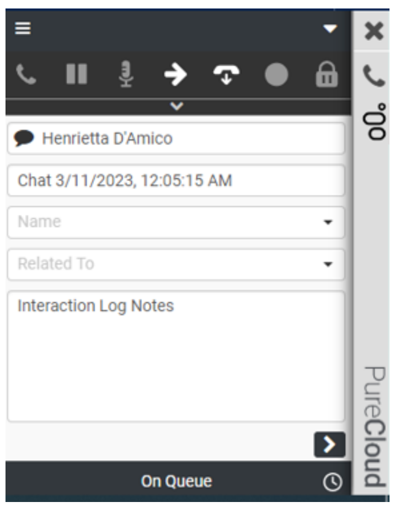


Transfer a chat interaction

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. See *Interaction Log*.



3. Once the transfer is done, proceed to *Wrapup*.

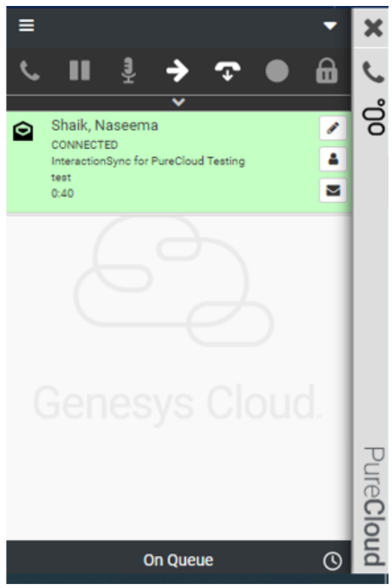
   Note: The Transfer Workspace option is available only for an existing entity.
4. Click **Disconnect** to complete the interaction.

6 Email Interactions

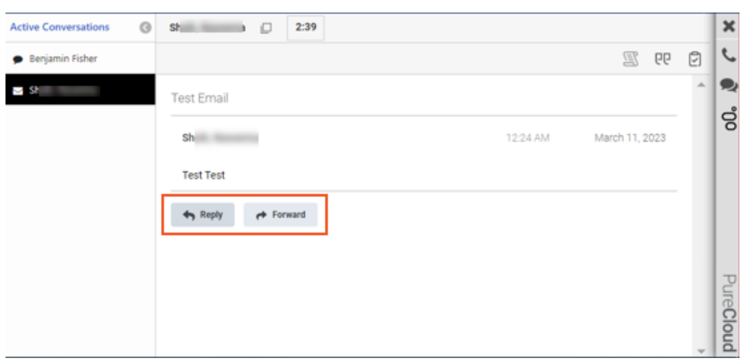
6.1 Receive an email interaction

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 or in a new browser window before responding.

Note: To have the email preview in embedded window, admins must configure the feature.

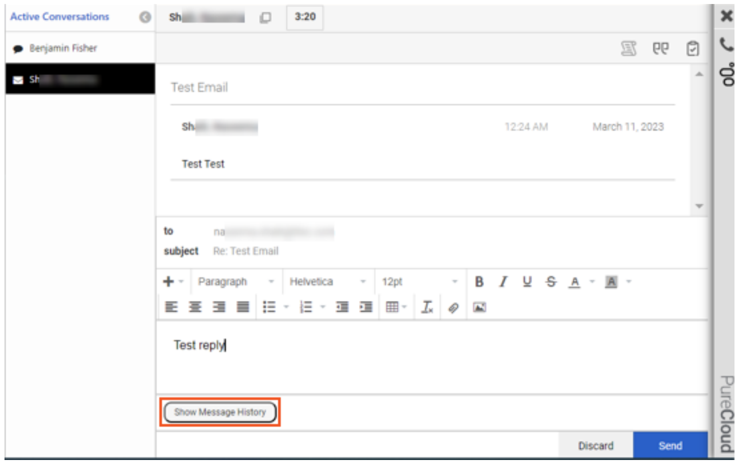


Email preview window



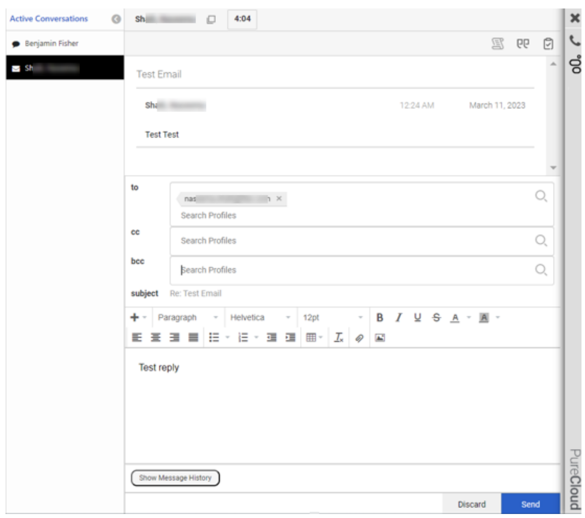
To reply or forward an email, click **Reply** or **Forward**.

Result: A draft email is created.

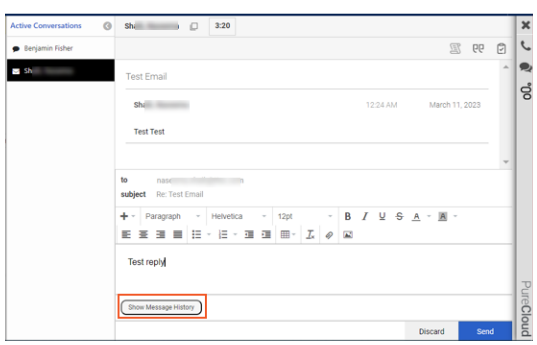


1. In the **To** field, enter the recipient email address. Upon clicking the **To** field, **CC** and **BCC** fields are populated.

   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.



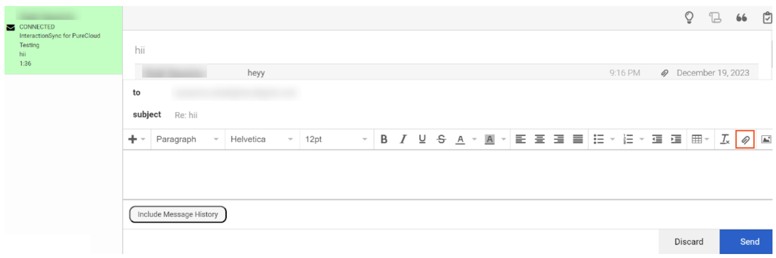
4. Click **Send**. Replying to or forwarding the email message automatically ends the interaction.
5. Proceed to *Wrapup*.

6.2 Attach a file to an email

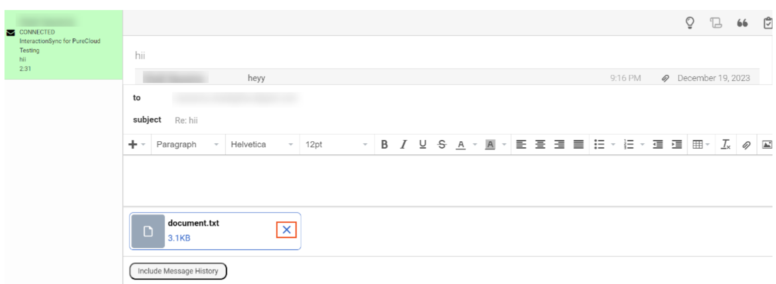
Agents can send attachments in an email.

To upload an attachment:

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



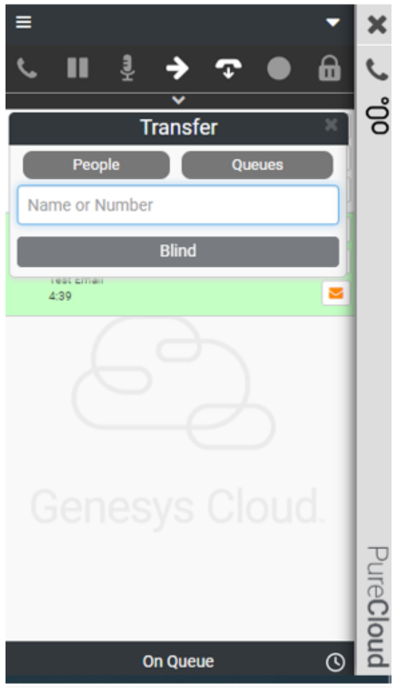
2. From the file dialogue window, select the file to upload, then click Open. The file uploads to the draft email. For larger files, a progress bar indicates upload progress. When the upload is finished, the file will appear in the draft email pane.
3. To remove an attachment from an email, click the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



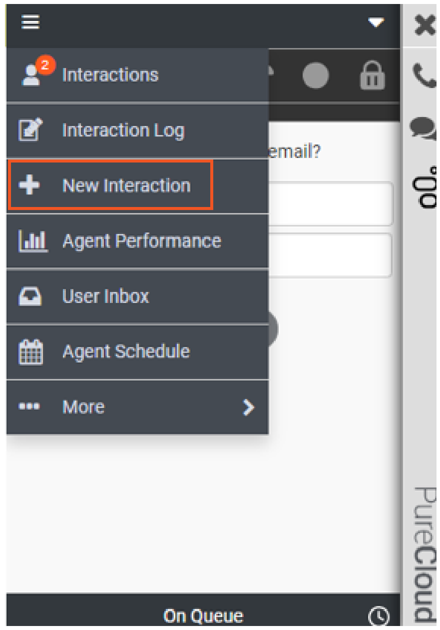
1. Search for an agent or queue and click **Blind** to transfer the interaction.
2. Notes can be added to track the activity for future reference. See *Interaction Log*.
3. Click **Blind**. The email is transferred to a new agent.

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

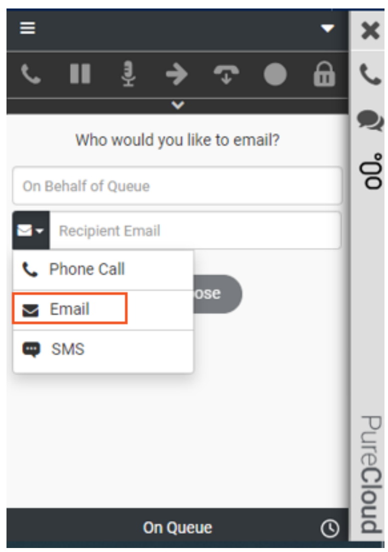
6.4 Make an Outbound email interaction

To place an Outbound email:

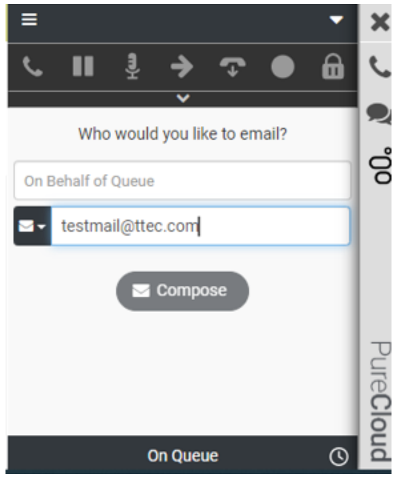
1. Click the hamburger icon located on the top left side of the InteractionSync pane.
2. Go to **New interaction**.



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 Revision history

Date	Version	Description of change
December 20, 2023	1.2	Updated Email interactions section.
June 15, 2023	1.1	Added *Multiple record interaction* to the Screen pop tab.
March 10, 2023	1.0	Creation of document.