Genesys Intelligent Automation Help

Identification

4/9/2025

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Identification

The Identification MicroApp allows callers to identify themselves using their Caller Line Identification (CLI), account number, or other unique identifier. The MicroApp also allows progressive levels of identification to be used within the same callflow.

When a caller dials in, the Identification MicroApp will help the caller identify themselves and proceed further through the callflow.

The Identification module comes with three different templates that can be used in callflows:

- Identification Single Function - Identify using a single question.

- Identification Double Question - Identify using two questions.

- Identification Double Question with Answer Correction - A variant of the Double Question with an option to change the answers.

All three templates share the same logic but their workflows may differ.

Single Question Identification Module

The **Prerequisite Identification Module** option allows you to set another module as a prerequisite before this module is triggered.

The **Fall-back Identification Module** option allows you to set another module as a fallback module. If the user fails the current module, the fallback module is triggered.

The **Maximum Attempts at This Identification Level** option allows you to define how many times that IA will try to identify a caller. This indicated the number of times the identification web services is called, not the number of times that a caller tries to identify themselves.

The **Behaviour for the 'Don't Know" Option** allows triggering a specific path for scenarios such as when the caller responds "I don't know." to the question, "What is your account number?" The option can either trigger a specific path for such queries or trigger the fallback identification module.

The **Behaviour when Maximum Attempts is Reached** option allows triggering a specific path for scenarios when the value specified in the **Maximum Attempts at This Identification Level** option is reached. The option can either trigger a specific path for such queries or trigger the fallback identification module.

The **Skip if Already Completed** option allows an identified caller to skip the Identification module. In scenarios where there are repeat transactions like multiple payments, this option when selected would allow the caller to bypass the Identification module for the second and subsequent payments in the same call.

The **Skip 'Ask ID question" step** option when selected would store the answers provided by the customer. The next time the caller dials in, IA checks if the answer is available and allows the caller to skip the identification module.

The **Web Service Details** section defines the web service URLs to be used for validation. You can define different URLs for test and production environments.

Double Question Identification Module

For the Double Question template, the flow is similar except that there are an additional identification question. The logic is similar to the Single Question template.

Double Question with Answer Correction Identification Module

The Double Question with Answer Correction template follows the same logic as a Double Question template but includes an additional **Skip 'Ask ID question" step** option. The callflow can allow a user to skip one or both questions as part of the identification flow.