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Genesys Intelligent Automation Help

Smart Transfer

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Smart Transfer

When a caller requests to speak to an agent, the Smart Transfer MicroApp allows you to either place the caller in the queue or offer a callback.

How it works

- If the estimated wait time is considered short, Intelligent Automation places the call in the queue.
- For a moderate wait time, Intelligent Automation plays the estimated wait time (in minutes) to the caller and then offers the callback option.
- For a long wait time, Intelligent Automation offers a callback option but doesn't play the estimated wait time.
- If the caller accepts the callback offer, Intelligent Automation offers an available time slot for the callback.
- If the caller accepts the time slot, the caller can specify the callback number - either the number they called in with or a different number.
- If the caller doesn't accept the callback offer or the available time slot, Intelligent Automation places the call in the queue.

Smart Transfer set up and configuration

Add the Genesys Smart Transfer module

To add the Genesys Smart Transfer module:

1. Navigate to **Applications -> Utility Modules -> Create a new utility module.**
2. Select **Genesys Smart Transfer Template (en-gb).**

Configure Smart Transfer settings

This section describes all available Smart Transfer settings.

Main Settings

Option	Description
Account Variable Name	The name of a mandatory variable (for example, AccountType). Refer to the Declaring variables section below for more information.
Automatic Transfer Threshold	This value, in seconds, defines a <i>short</i> wait time. If the expected wait time is equal to or lower than the value specified here, Intelligent Automation automatically places the call in the queue. It does not play back the estimated wait time or offer a callback option. The default value is 60.
Upper Wait Time Play Back Threshold	This value, in seconds, defines a <i>long</i> wait time. If the expected wait time is equal to or greater than the value specified here, Intelligent Automation offers a callback option but does not play the estimated wait time. The default value is 600. If the expected wait time falls between the Automatic Transfer Threshold value and the Upper Wait Time Play Back Threshold value, Intelligent Automation plays the estimated wait time to the caller and offers the callback option.

Web Service Details Settings

To fetch the estimated wait time and available time slots, and to schedule the callback appointment, Intelligent Automation sends API requests to Genesys Mobile Services (GMS) (the platform Callback is built on). It relies on the fish-services Web application to format and translate requests and responses transmitted between Intelligent Automation and GMS.

Use the Web Services Details Settings section to specify the URLs that call on the fish-services Web application and specify a value for the **Web Service Timeout** option, which defines the amount of time that Intelligent Automation waits for a response from the web service. If the response doesn't return before this value is reached, Intelligent Automation treats the request as being in an error state.

The table below lists the following information:

- The name of each web service
- The URL used to call on to the fish-services Web application
- The API that the fish-services Web application calls on to retrieve the web service information
- The URL format for the API call

Web service name	URL to call fish-services Web application	API used by fish-services	URL format for API call
EstimatedWaitTime	http://<host>:<port>/fish-services/callback/EstimatedWaitTime.jsp	Stat Server API	http://<hostname>:<port>/genesys/1/internal_statistic

Web service name	URL to call fish-services Web application	API used by fish-services	URL format for API call
CallbackAvailabilityTimes	http://<host>:<port>/fish-services/callback/CallbackAvailabilityTimes.jsp	Callback Services API	http://<hostname>:<port>/genesys/1/service/callback/{callback-execution-name}/availability Note: Replace {callback-execution-name} with the name of the web service.
RequestCallback	http://<host>:<port>/fish-services/callback/RequestCallback.jsp	Callback Services API	http://<hostname>:<port>/genesys/1/service/callback/{callback-execution-name} Note: Replace {callback-execution-name} with the name of the web service.

Declaring variables

Within the fish-services Web application, you can use the **genesys_callback.properties** file to specify information such as the URLs and timeout values.

Within the **genesys_callback.properties** file located in fish-services, each web service call has a **ParametersPassThrough** field which you can use to specify the names of variables you need to send through from Intelligent Automation to GMS (including the one specified in the **Account Variable Name** field on the **Smart Transfer Settings** page in Intelligent Automation). All variables listed here must be in comma separated format.