Web Services and Applications Configuration Guide

Enabling Agents To Manage Contacts

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Enabling Agents To Manage Contacts

Contents

Procedure: Enabling agents to manage contacts

Purpose: To enable an agent to view and manage contact information.

Prerequisites

- A working knowledge of Genesys Administrator Extension.
- The `WS_Cluster` application object exists in the Configuration Database.
- The `WS_Cluster` application has a connection to Universal Contact Server.
- The `WS_Cluster` application has a connection to Interaction Server.
- The agent object is configured to use one or more of the following media channels:
  - E-Mail
  - Chat
  - Facebook
  - Twitter

Start

1. In the `feature-definition.json` file you can enable the following apis depending on your environment:
   - For environments that include eServices: `api-multimedia`
   - For voice-only environments: `api-ucs-voice`
2. Configure the Contact options in the `interaction-workspace` section of the `WS_Cluster` application object.

End

Procedure: Enabling agents to handle voice interactions without an assigned contact

Purpose: To create voice interactions in the Universal Contact Server (UCS) database without an associated **contactId**. This feature also enables the **Note** view for interactions without an assigned contact.

By default, Workspace does not create a voice interaction in the USC database if a **contactId** is not assigned to a voice call. An interaction might not have an assigned **ContactId** if the contact lookup request returns no matching contact and the agent does not assign a contact to the interaction. In some environments, agent configuration might prevent the association of a **contactId** with an interaction. For example:

- The value of contact.lookup.<media-type>.enable is **false**. In this scenario, contact lookup is not performed and no **contactId** is assigned.
- The value of contact.lookup.<media-type>.enable is **true**, but the value of contact.ucs-

interaction.voice.enable-create is set to **false**. In this scenario, contact lookup is performed, but when no matching contact is found, the interaction history is not created in the UCS database.

- The value of privilege.contact.can-use-assign-contact is set to **false**. In this scenario, when a **contactId** cannot be assigned automatically to a voice interaction, it is not possible for the agent to manually create a contact or assign an interaction to a known contact.

Prerequisites

- A working knowledge of Genesys Administrator Extension.
- Procedure: Enabling agents to manage contacts

Start

Configure the value of the contact.ucs-interaction.voice.enable-create-without-contact option to **true**.

End

Procedure: Enabling the Contact Directory and Contact History

Purpose: To enable an agent to use the Contact Directory and Contact History views.

This functionality enables agents to search the contact data base, create new contacts, and delete existing contacts.

The Contact Directory supports two views, a grid and a list.

Prerequisites

- A working knowledge of Genesys Administrator Extension.
- The `WS_Cluster` application object exists in the Configuration Database.
- The `WS_Cluster` application has a connection to Universal Contact Server.

Start

1. In Genesys Administrator Extension, create or update a Business Attribute in the tenant that contain(s) your agents.
    - The Type of the Business Attribute is `Interaction Operation Attributes`.
    - The Attribute values are the codes that are available for the agent:
        - name—Used in attached data.
        - annex—Used in the Agent interface. Include a settings section with these options:
            - is-sortable = true
            - is-searchable = true
2. Configure the following Interaction options in the `interaction-workspace` section of the `WS_Cluster` object:

- contact.myhistory-displayed-columns

  - contact.history-displayed-columns

- Configure the Contact options in the `interaction-workspace` section.

End

Procedure: Enabling Last Routed Agent

Purpose: To enable the last routed agent feature, which saves information about the last agent who handled interactions from that contact in the Contact Profile. That information can then be used during the routing of subsequent interactions from this contact. When an agent actively handles an interaction of a given media type from a contact, the following keys are set in the Contact Profile:

- `LastCalledAgent_EmployeeID`
- `LastCalledAgent_TimeStamp`
- `LCA_EmplID_<MediaType>`
- `LCA_TimeStamp_<MediaType>`

Where <`MediaType`> corresponds to the media of the interaction.

Refer to the eServices and Routing documentation for more information about this feature.

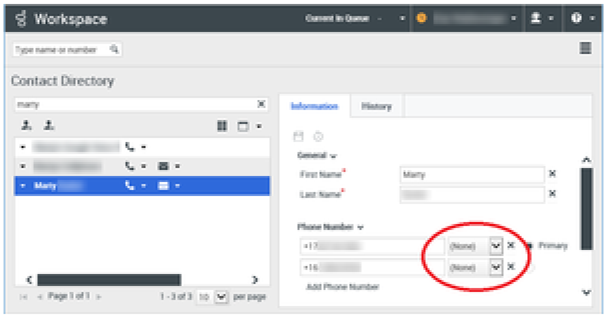
Start

1. You can activate this feature by setting the following options in the `interaction-workspace` section:
   - To globally enable last routed agent, set the contact.last-called-agent.enable option to `true`
   - To activate it by media type, set contact.lookup.<media-type>.enable to `true`.

End

Add predefined descriptions for a custom contact attributes with multiple values

You can add a custom attribute to the Contact Information that can be populated with multiple values. It is possible to assign a description to those values, either by allowing the user to add plain text (the default mode) or through a selection of a pre-defined descriptions through a drop-down list (the mechanism described here). For example, you might want to create a new contact attribute called "Company" and, for each value assigned to this contact attribute, associate a **Company Type** from a predefined list.



Use the following steps to create the attribute and add it to the Contact Information view:

1. Create a new Business Attribute where the Business Attribute Values represent the list of valid descriptions that are displayed in the drop-down control; for example, **CompanyTypes**.
2. Create a new Business Attribute Value in the Business Attribute **ContactAttributes**; for example, **Company**.
3. In the annex of the new Business Attribute Value of the Business Attribute **ContactAttributes**, create a section called **settings**.
4. In the **settings** section, create a Key-Value Pair (KVP) where the key is **MultipleValues-Descriptions** and the value is the name of the Business Attribute created in step 1 to store valid descriptions; for example, **MultipleValues-Descriptions** = **CompanyTypes**.
5. Make the new Contact Attribute part of the contact profile by adding the value, **Company** in this example, to the contact.displayed-attributes application option.
6. Make the new Contact Attribute of type **multiple** by adding its name to the contact.multiple-value-attributes application option. For example, `contact.multiple-value-attributes=` 'FirstName,LastName,Company'
7. Restart Workspace.

Change the displayed columns in the Contac Directory

To change the displayed columns in the contact directory, use the contact.directory-displayed-columns option to specify valid objects from Universal Contact Server (UCS) and Business Attribute values.

Custom contact attributes can be created using the Web Services API or by using UCS.

To populate the Contact Information view and the Contact Directory, you must use Business Attributes:

1. In Genesys Administrator Extension, create a new Business Attribute by using the name and display name of the Custom Contact Attribute.
2. In UCS 8.5 environments, configure the new Business Attribute as follows (Business Attributes are automatically searchable and sortable in UCS 9.1 environments):
    1. Set the **is-searchable** option to `true` to make the Business Attribute available for contact searches.
    2. Set the **is-sortable** option to `true` to make the Business Attribute available in the directory view.