GENESYS™

Genesys Engage Migration for Echopass Guide

Genesys Engage cloud Public

12/31/2021

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Genesys Engage cloud Migration Guide

Welcome Enterprise Legacy Cloud (Echopass) users to the Genesys Engage cloud Migration Guide. In this guide we will map your use cases to the components you will be using in Genesys Engage cloud.

The purpose of this guide is to provide Genesys Engage cloud documentation resources that assist Enterprise Legacy Cloud (ELC) users who are migrating to a Genesys Engage cloud environment. Each chapter focuses on a feature or application in Genesys Engage cloud. The chapter section titles represent tasks you performed in ELC, and the section text provides a description of a comparable task in Genesys Engage cloud as well as links to detailed Genesys Engage cloud documentation.

The following table provides a list of ESM (also known as Cloud Administrator) applications, corresponding Genesys Engage cloud applications, and a brief description of the tasks you can perform using the Genesys Engage cloud application. The table also contains a **Roles** column that indicates the role level required for a specific application. The roles referenced in the table are as follows:

- Agent: A person who processes and handles customer interactions and requests.
- Supervisor: A person who manages a group of team leaders and/or agents and also assists with processing customer interactions and requests.
- Administrator: A person who manages the contact center from an operations standpoint (provisioning, monitoring, etc.).

Roles	ESM (Cloud Administrator) application	Genesys Engage cloud application	Tasks
Administrator	EchoAdmin	Agent Setup	Create and manage agent accounts. • Manage agent groups • Manage agent skills • Manage user passwords • Assign agent, administrator, and supervisor rights • Bulk upload of agent groups • Configure Auto Answer and Not Ready Reason preferences • Configure personal and corporate speed dials • Manage dispositions • Manage digital channels such as chat or email
Administrator	EchoRouting	Designer	Develop Self Service and Assisted Service applications. • Build Interactive Voice Response (IVR) applications

Roles	ESM (Cloud Administrator) application	Genesys Engage cloud application	Tasks
			• Store data to be used by Designer applications • Manage routing options • Manage callback parameters • Create surveys • Manage IVR messages • Manage DNIS mapping • Configure group and individual voicemail
Supervisor, Agent	EchoContact	Agent Desktop	Use various channels to interact with customers and co-workers. • Receive inbound voice and non-voice interactions • Place outbound voice calls • View recent interactions • Perform call handling functions • Participate in multimedia interactions • Handle simultaneous chat sessions • Manage speed dial functions
Administrator	EchoCallback	Callback	Callback allows customers to provide the system with a phone number to be used for immediate callback, scheduled callback, or both. • Offer Scheduled callback, Immediate callback or both • Offer Callback based on estimated wait time • Detect answering machine • Provide option to remain in queue
Administrator, Agent, Supervisor	EchoReports, EchoPulse, EchoInsite	Reporting	Genesys Engage cloud offers both real-time and historical reporting. • Real-time reporting • Historical reporting • Out-of-box historical reports
Administrator	Outbound	Outbound	Genesys Outbound enables clients to administer and manage their outbound campaigns.

Roles	ESM (Cloud Administrator) application	Genesys Engage cloud application	Tasks
			• Busy, disconnect, no answer, and answering machine screening • Answering machine beep tone detection • Dialing modes • List and campaign management • Create campaign sequences
Administrator, Supervisor	Genesys Workforce Management	Work Force Optimization and Workforce Management	Analyze and manage agent performance and customer interactions. • Call and screen recording • Quality monitoring • Manage agents
Administrator	Third party integrations	Custom Integrations	Custom back-end integrations and SFDC integrations.

Agent Setup

Agent Setup is a cloud-based web application that allows you to manage your cloud-based contact center and agent accounts for products such as Agent Desktop and Gplus Adapters. For more information about Agent Setup, see Agent Setup.

ESM application	Genesys Engage cloud application
ESM EchoAdmin	Agent Setup

Creation of user accounts

You can create single user accounts in the **Users** tab in Agent Setup. To create a single user account, select **Add User** from the **User Actions** drop-down menu.

You can create multiple user accounts in the **Bulk Import** tab in Agent Setup. To create multiple users, use a CSV file to supply the required user data. You can use a template to automatically configure some of the user parameters. If values from the CSV file correspond with values in the template, the values from the CSV file take precedence and overwrite the template values. For more information about Bulk Import, see Importing agent accounts.

Assigning agents to Agent Groups for real-time reporting views

You can configure what agent and contact center statistics are displayed to the agent on their desktop. In the **Statistics** tab in Agent Desktop settings, you can add and edit statistics, import custom statistics, or export all statistics. To configure contact center statistics you must add a resource, such as agent groups, queues, and routing points. After you have added a resource you can add a statistic and configure the options. For more information about statistical reporting, see the *Agent statistics* and *Contact center statistics* sections in Agent Desktop settings.

Manage Users tab

You can manage agents using the options in the **Users** tab in Agent Setup, including adding new accounts, importing agent accounts from an external file, and exporting agents. For information about managing agents, see Agent Setup.

Phone number

You can assign a default phone number to a user. In Agent Setup click the **Users** tab and click a user account to open the **Manage User** screen. Navigate to the **Phone Number** section and select the

Default checkbox for a phone number to make it the default phone number. You can configure the default phone number for a new user or update the default value for an existing user. For more information about phone numbers, see Agent accounts.

Caller ID

You must add at least one identifier to be displayed on the receiver's call display. If you add more than one identifier, the user has the ability to choose which identifier to display. You can also enable an anonymous caller ID for the user. For more information about Caller ID, see Agent accounts.

Wrap Up Time

You can configure Wrap Up Time for an agent. Wrap Up Time is a period of time after the completion of a call that is allotted to tasks such as creating notes or selecting the disposition of the call. For more information about Wrap Up Time, see Agent accounts.

Manage Skills for a single agent

In order to manage skills for a single agent, navigate to the **Skills** link in the **User** tab. You can add any of the skills available in the **Skills** menu, or you can delete previously assigned skills. For more information about managing skills, see Agent accounts.

Manage Agent Groups

You can manage an agent group by selecting a group from the **Agent Groups** list in the **Users** tab. An agent group is a logical grouping of agents that provides particular sets of contact center services. For more information about managing an agent to an agent group, see Agent Groups.

Manage Access Groups

You can assign an agent to an access group, which is a logical grouping of agents that is provided with specific access permissions. For more information about access groups, see Access Groups.

Assign users to sites

You can use agent groups to assign agents from a particular site to the same group. For more information about agent groups, see Agent Groups.

Folders

You can create and manage folders in Agent Setup. You can use folders to organize users into various categories, such as departments or agent groups. For more information about folders, see Contact center settings.

Assign Agent Rights

You can assign agent rights to a user in Platform Administration. In the **Configuration** tab select **Accounts** > **Roles**. Click a user name and the select the **Agent** option to assign agent rights to that user. For more information about assigning rights to a user, see Roles.

Assign Administrator Rights

You can assign administrator rights to a user in Platform Administration. In the **Configuration** tab select **Accounts** > **Roles**. Click a user name and the select the **Administrator** option to assign administrator rights to that user. For more information about assigning rights to a user, see Roles.

Assign Supervisor Rights

You can assign supervisor rights to a user in Platform Administration. In the **Configuration** tab select **Accounts** > **Roles**. Click a user name and the select the **Supervisor** option to assign agent rights to that user. For more information about assigning rights to a user, see Roles.

Reset Password

You can specify that a user receives a prompt to change their password on their next log in. In Platform Administration, go to **Configuration** > **Accounts** > **Persons**, and select a user (or create a new user). In the user information screen, select **Force Password Reset on Next Login**. For more information about resetting passwords, see Users (Persons).

Prompt for Place

You can specify that a user enter a value for place during login by selecting the **Prompt Place** option in the **Global Login** section of Desktop Options. For more information about Prompt for Place, see Global Login options.

Manage Channels

In order to configure channels for the call center, go to **Agent Setup** > **Contact Center Settings** > **Desktop Options** and select the channels for the contact center. For more information about selecting channels for the call center, see Channel options.

Manage Dispositions

Dispositions are descriptions of the final outcome of a call that you can use to flag calls for reporting purposes. You can create and organize dispositions in the **Dispositions** screen in Desktop Settings. For more information about dispositions, see Dispositions.

Bulk upload of Skills with CSV file

You can add a large number of agents at one time using the **Bulk Import** tab in Agent Setup. By importing a large number of agent accounts at one time, you do not need to add the accounts one at a time and you can apply a template to configure options, such as DN, place, person, and login options, to all accounts. You can use a CSV file to provide values for agent configuration. For more information about bulk import of agent accounts, see Importing agent accounts.

Auto Answer Preferences

You can configure voice, chat, and email auto answer preferences in the **Global Login** section of Desktop Options. You can also configure **Voice Auto Ready** status, which places the agent in the **Ready** state as soon as they log in. For more information about configuring auto answer preferences, see the *Global Login* section in Global Login options.

Not Ready Reason Preferences

Auto Not Ready Reason places the agent in Not Ready state as soon as they log in. For more information about configuring Auto Not Ready Reason preferences, see the *Global Login* section in Global Login options.

Additional customizable tabs

You can integrate external websites into the agent Workspace main view. These websites appear in dedicated tabs that allow you to access the external site without leaving Workspace. For voice interactions, the external website displays in the background. For multimedia interactions, the external website displays in a dedicated view in the case data. For more information about external websites, see External URLs.

Configure line display

You can configure the information that is displayed to an agent when they receive an interaction such as a call or chat (toast data), or when an interaction is transferred to them (case data). For more information about Case and Toast data see Case & Toast Data.

Configure global and personal favorites

In the **Contact Center Settings** tab of Agent Setup, you can create a list of globally favorite contacts and internal targets for your agents (such as other agents, team leads, or call routing) in the Team Communicator. In the **Agent Desktop settings** screen, you can specify which favorites to assign. For information about managing global favorites in Contact center settings, see Global Favorites.

In the **User** tab of Agent Setup you can configure personal favorites for individual users. For more information about managing personal favorites for users, see Agent accounts.

Digital Channels

Support for Multimedia Interactions

You can configure agent accounts to support multimedia transactions. It is possible for an agent to use several types of media, such as voice, chat, or email, during the same interaction. For more information about multimedia interactions, see Channels.

Concurrent Chat Sessions

You can conduct multiple chat interactions simultaneously. For example, you might engage in a chat session with a customer and concurrently chat with a supervisor. For more information about concurrent chat sessions, see Chat.

Customer and Agent Typing Notification

During a chat session a notification is displayed when a contact begins typing. A notification is also displayed to the contact when an agent begins to type. In both cases, the text being typed is not visible until the message is sent. For more information about typing notifications, see Chat.

Standard responses

Standard responses are prewritten responses that you can use in interactions. The prewritten responses can be text that you add to an email or chat interaction, or you can speak the text during a voice interaction. For more information about standard responses, see Standard responses.

Select Not Ready Reason Codes

You can configure Not Ready Reason Codes for agents. In Agent Desktop Settings click **Custom Agent States**, navigate to the **[Not Ready]** section and type a **Not Ready Reason** then click **Add**. For more information about selecting **Not Ready Reason Codes**, see Custom Agent States.

Manage ACW Behaviors

You can manage the amount of time allocated to an agent for After Call Work (ACW). In **Agent Setup** click the **Users** tab, select a user, and configure a value in the **Wrap Up Time** field. For more information about configuring the amount of ACW time for an agent, see Agent Accounts.

You can also view the **Agent Activity Business Result** report to retrieve historical ACW data on a per agent basis. Using this report you can view information for the amount of time an agent was in wrap state, the average amount of time per interaction an agent spends in wrap state, and the total amount of times an agent was in wrap state after being consulted on a customer interaction. For more information about the **Agent Activity Business Result** report, see Agent Activity Business Result.

Mail Transcript to Customer

You can configure chat to allow a customer to receive a transcript by email. In **Contact Center Settings** click **Desktop Options**, select **Chat**, then select **Click from Chat to eMail**. Enabling this option allows the customer to click a link in chat to receive a transcript by email. For more information about receiving a transcript by email, see Contact Center Settings.

Email features

- You have multiple options for routing emails:
  - You can route emails on a first-in-first-out (FIFO) basis.
  - You can route emails based on agent skills.
  - You can route emails based on a keyword in the subject line.
  - You can route emails based on a keyword in the email body.

  For more information about routing emails, see Designer.
- You can save emails for up to 90 days in your workbin.
- Emails can be transferred from agent to agent, or from an agent to a queue. For more information about transferring emails, see Email.
- You can use a standard response when you reply to an email.
- You can view emails that you have previously sent to contacts. For more information about viewing previously sent emails, see Contact and interaction history.
- You can send email attachments to customers and receive email attachments from customers. You can also store email attachments that you have received. The maximum size for attachments (either sent

or received) is 5 MB. For more information about email attachments, see Email.

- You can automatically insert customer names into outgoing emails. You can also automatically include items such as greetings, salutations, and signatures.
- Agents can store emails in workbins. The agent retains ownership of the email while it is in the workbin; this allows the agent to perform offline work before responding to the email.
- Workbins can be searched periodically to determine how long the emails they contain have been idle. Emails with idle times exceeding a predetermined threshold can be put back into routing. You can configure the idle time threshold.
- Genesys email supports POP3, SMTP, and EWS connections. For more information, see Email Server.
- You can forward emails to external sources. Forwarded inbound emails are copied as a quote into a new email interaction. You can add comments or other information in the body of the email, above the area that contains the quoted inbound email. For more information about forwarding emails, see Email.
- Supervisors can select emails for review before they are released by the system. The supervisor can approve or reject the email, or send it back to the originator with comments or instructions. If the originator makes changes to the email, the review process repeats. For more information about reviewing emails, see How does email quality assurance work?.

Chat features

- Chat capability for both authenticated and non-authenticated users on a client's website.
- Customers have the ability to manually terminate a chat session at any time, including before an agent has joined the interaction.
- You can assign a nickname to an agent to protect their identity. In the **Desktop options** section of Contact center settings, navigate to the **Chat** section and configure a nickname for the agent.
- You can generate a screen pop that displays customer information in **Agent Desktop**. In the **Contacts** section of Contact center settings you can configure options to display customer information.
- You can specify that chat interactions take place during business hours. You can also configure holidays and special days when chat service is unavailable. For information about configuring chat availability times, see Genesys Designer Help.
- You can differentiate between agent and customer text by using color treatments.
- Genesys Widgets allow you to support and configure multiple languages. For more information about Genesys Widgets, see Genesys Widgets.

  Note: Genesys Widgets documentation is restricted to customers who are enrolled in the Early Adopter Program. Please contact Product Management for enrolling in this program.

- You can push a website link to a customer during a chat interaction.
- You can create a conference between yourself, a customer, and another person in your company. For more information about creating chat conferences, see How do I handle a chat interaction?.
- Supervisors can barge-in on chat interactions. If a supervisor does barge-in on a chat interaction, they are visible to both the customer and the agent. For more information about barging-in on chat interactions, see Supervising agents.
- Chat interactions can be transferred from agent to agent, or from an agent to a queue. For more information about transferring chat interactions, see Chat.

- You can participate in a consultation with another agent. Consultations are not visible to the customer and can occur during an interaction or prior to an interaction. For more information about consultations, see Internal interactions.
- An agent can transfer a chat interaction to another agent, and can assign a priority to the chat interaction that is higher than the priority levels of other chat sessions in the queue. For more information about transferring chat interactions, see How do I transfer an interaction to another team member?.
- You can route chat interactions based on agent skills. For more information about routing chat interactions, see Genesys Designer Help.
- Genesys Widgets can be deployed to a customer website to provide passive and proactive customer support, including Webchat. Webchat allows a customer to initiate a chat session with an agent. The Webchat widget allows users to customize the chat environment by making changes to font and color themes, adding a company logo, or altering the chat window size. For more information about Webchat and Genesys Widgets, see Genesys Widgets.

Note: Genesys Widgets documentation is restricted to customers who are enrolled in the Early Adopter Program. Please contact Product Management for enrolling in this program.

Designer

Important

To access this content:

- **Customers**: Log in to My Support and select *Documentation*.
- **Partners**: Log in to Partner Portal and select *Genesys Technical Docs*.
- **Employees**: Go to the internal access point.

You can use Genesys Designer to create Self Service or Assisted Service applications. Applications consist of blocks, which represent common tasks. Blocks are arranged to provide the flow and logic that determine how the application executes.

Click here to access this content (login required)

Agent Desktop

Genesys Agent Desktop enables communication with co-workers and customers. Interactions can use various channels, such as voice, chat, or email. You can get help from team members, use standard responses, and contact or respond to customers.

ESM application	Genesys Engage cloud application
ESM EchoContact	Agent Desktop

Receive inbound voice and non-voice interactions

In Agent Desktop you can receive interactions on almost any Channel, such as chat or email. Interactions can include conferences, consultations, transfers, or direct calls from customers. For more information about customer interactions, see Customer interactions.

Outbound voice and non-voice interactions

You can call or email individual customers to interact with them directly, or you can make outbound calls as part of a campaign. For more information about outbound interactions, see Customer interactions.

View recent interactions

You can view your recent interactions in the **My History** view in Agent Desktop. In the main view click the menu icon (☰) and select **My History**. The **My History** view provides information about interaction subject, status, start and end dates, and additional interaction details. For more information about viewing your recent interactions, see Contact and interaction history.

You can view the interaction history of a particular contact or team member. In the main view click the menu icon (☰) and select **Contact Directory**. Select a contact and click the **History** tab to view the interaction history for that contact. For more information about viewing contact interaction history, see Contacts.

You can also search the interaction database to view all contacts, agents, and media types. In the main view click the menu icon (☰) and select **Interaction Search**. You can then search or filter interactions based on criteria you supply. For more information about searching all interactions, see How do I find any interaction?.

Perform call handling functions

A variety of call handling functions can be performed in Agent Desktop. When an agent receives a call, they can handle it themselves, handle the call with help, or transfer the call. For more information about handling calls, see Calls.

Call help can be in the form of looking for standard responses, searching the knowledge base, searching contact and interaction history, starting a consultation, or starting a conference. You can also integrate other channels into the conversation to enhance the customer experience. For more information about blending channels, see Blend Different Channels Into A Single Conversation.

Call Recording enables you to record the current voice interaction. There are two types of call recording: emergency recording and controlled call recording. In Agent Desktop, both Agents and Supervisors have options to record a call, stop recording a call, pause recording a call, and resume recording a call. For more information about Call Recording, see How do I record a call?.

Receive and respond to multimedia interactions

In Agent Desktop you can receive and respond to various types of multimedia communications.

In the email interaction window you can reply to, transfer, forward, or save emails. You can get help with an email by checking case data or consulting with a team member. A Supervisor can use Quality Assurance to review and accept or reject outbound emails before they are sent. Supervisors can extract an email from an agent workbin and assign it to another agent. Supervisors can also update case information for extracted emails. Emails in the email queue are viewable and searchable by both Team Leads and Agents. Team Leads can remove an email in the email queue without opening the email. For more information about email interactions, see Email.

You can accept chats requests from customers. During chat, you can start a chat conference, call or email the contact, transfer the chat, or start a consultation. For more information about chat, see Chat.

Create and utilize speed dial functions

You can establish a list of favorites, which typically are team members you contact frequently. If you want to designate a contact as a favorite, select **Add to Favorites** from the drop-down actions menu in Team Communicator. You can sort, filter, and edit favorite information. You can also assign a favorite to a category. Supervisors can create corporate favorites; these favorites cannot be edited or removed by agents. For more information about favorites, see How do I set up my favorites?.

Supervising agents

Supervisors manage and support team members, interactions and queues. In Agent Desktop supervisors can monitor, coach, or barge-in on agent voice or chat interactions. If a supervisor is monitoring an agent, the process is transparent to the agent unless the agent account has been configured to notify the agent that he or she is being monitored.

Supervisors can globally log off agents form all logged in channels. Supervisors can also change the agent state to Ready or Not Ready.

For more information about supervising agents, see Supervising agents.

Chat Transcript stored in Customer History

You can view transcripts from previous chat sessions. In Agent Desktop, click the menu icon () and select **My History**. You can filter or search the results to find previous interactions, including chat transcripts. For more information about viewing chat transcripts, see Contact and interaction history.

Callback

Genesys Callback allows customers to provide a phone number that can be used for Immediate or Scheduled Callback. Using Callback allows customers to spend less time on hold and can free up system resources.

ESM application	Genesys Engage cloud application
EchoCallback	Callback

Application development using Callback blocks

Blocks represent common tasks that you can perform in Designer. Blocks are grouped in categories on the Palette. You can drag blocks from the Palette to Application Flows and place them in the phase in which you want them to execute. For more information about Blocks, see Using Blocks.

Offer Scheduled callback, Immediate callback or both

You can offer callers Immediate Callback, Scheduled Callback, or allow them to choose the callback option they prefer. Use **Callback** blocks in the Assisted Service phase of your Default type application for inbound calls. In the **Callback** block you configure variables for immediate and scheduled callback. You can make a callback option available to a customer by configuring its corresponding variable value to `true`. For more information about Immediate Callback and Scheduled Callback, see Callback Block.

Define and administer callback parameters

You can define and administer callback parameters in Data Tables. Data Tables are two-dimensional arrays similar to spreadsheets. You can update the parameters that Callback uses by changing values in the appropriate data table. For more information about Data Tables, see Data Tables.

Offer Callback based on estimated wait time

You can use a Statistic Block to retrieve estimated wait time (EWT) for a queued call. You can offer callback to a customer if the EWT value exceeds a threshold value that you configure. In the **Call Routing** tab of the **Callback** block you can specify an EWT threshold for Callback. For more information about Callback based on EWT, see Callback Block.

Detect answering machine

You can detect when a call connects to an answering machine. If an answering machine is detected, you can play a treatment to offer scheduled callback after business hours. For information about playing treatments, see Play Treatments.

Provide option to remain in queue

The Callback feature requires you to create a user variable that stores whether clients can decline callback and remain on hold. Configuring the user variable to *true* gives users the option to remain on hold when callback is offered. The user variable is used in the **Call Routing** tab of the **Callback** block. For more information about configuring user variables, see Callback Block.

Reporting

Genesys Engage cloud offers both real-time and historical reporting. Genesys Pulse provides real-time information about transactions that are currently taking place in the call center. To view information about customer interactions over a specified period of time, use Historical Reporting.

ESM application	Genesys Engage cloud application
EchoPulse, EchoInsite	Genesys Real-time reporting
EchoReports	Genesys Historical Reporting

Real-time reporting

Genesys Pulse provides a real-time view of contact center statistics within the Platform Administration interface. Widgets on the Genesys Pulse dashboard display object's statistical charts. You can expand widgets to provide additional views and details. For more information about real-time reporting using Genesys Pulse, see Real-time reporting.

Historical Reporting

Historical reports provide information about contact center and agent performance over a variable period of time. A number of out-of-box historical reports are available that meet most business needs. However, you can also customize historical reports, or create new reports.You can run historical reports on demand, or you can schedule reports to run at a specific time. For more information about historical reports, see Historical reporting with Genesys CX Insights.

Historical reporting out-of-box reports

Historical reports help you understand the performance of your contact center over time. For more information about historical out-of-box reports, see What historical reports are available in Genesys Engage cloud?.

Outbound

Outbound is a customizable cloud-based solution that allows you to set up, monitor, and assess your campaigns.

ESM application	Genesys Engage cloud application
ELC Outbound	Genesys Outbound

Dialing modes

You can configure a dialing mode based on campaign type, the number of agents available, and any legal requirements that may affect the campaign. If you choose automatic dialing, you can configure either predictive or progressive dialing. If you choose manual dialing, you can use preview dialing. For more information about dialing modes, see Outbound Solutions.

Do not call list

Compliance rules suppress contact attempts. There are two types of compliance rules; contact location rules, which suppress contact attempts based on location and contact attempt rules, which suppress contact attempts based on contact attempt history. For more information about compliance rules, see Compliance.

You can also suppress contact attempts at the campaign level:

- List Exclusion rules can suppress campaign contact attempts based on factors such as location or time zone.
- You can select a contact suppression list to use with a campaign strategy. Suppression lists configured in the campaign strategy become the default for sub-campaigns. However, you can override or disable the default when you create a new sub-campaign.
- You can use contact history as the basis for suppressing contact attempts.If you use contact history suppression as part of the campaign strategy, it becomes the default for sub-campaigns. However, you can override or disable the default when you create a new sub-campaign.

For more information about suppression at the campaign level, see Outbound Solutions.

List and campaign management

You can monitor list and campaign progress on the Campaign page in Account Manager. The List Columns and Attempts sections provide list and contact attempt information you can use to assess your campaign. For more information about list and campaign management, see Outbound Solutions.

Create campaign sequences

You can create campaign sequences by adding sub-campaigns to campaigns. For information about creating and managing campaigns, see Campaigns. For information about creating and managing sub-campaigns, see Sub-campaigns.

Work Force Optimization and Workforce Management

This chapter provides information about Genesys Work Force Optimization (WFO) and Genesys Workforce Management (WFM). WFO allows you to assess and analyze customer interactions and agent performance, while WFM provides a set of management tools that allows you to better manage your workforce.

ESM application	Genesys Engage cloud application
Genesys Workforce Management, third party WFO	Genesys Workforce Optimization, Genesys Workforce Management

Work Force Optimization - Recording and Quality Monitoring

You can use recording and quality monitoring capabilities to optimize workforce performance.

- **Call Recording** - Call Recording can address liability and quality concerns. Call recording allows you to record all of the calls into a particular service, or just part of the calls. You can base call recording on standard telephony information, such as caller ID, or you can base call recording on call routing data. Relevant customer data is stored with the call recording, making collections of recordings searchable. You can pause and resume recording to allow for external events that you may not want to record, such as the collection of a credit card number. Call recordings are accessible from any location with secure network connectivity. For more information about call recording, see Workforce Optimization.

- **Screen Recording** - A screen recording is a recording of the agent's screen during an interaction. You can use screen recording to address liability and quality concerns. For more information about screen recording, see the *Record and Analyze Customer Interactions* section in Workforce Optimization.

- **Quality Monitoring** - Quality Monitoring helps you develop forms and questionnaires to evaluate performance, knowledge, and productivity. You can also review recordings of agent interactions to aid in performance evaluation. For more information about Quality Monitoring, see the *Assess Knowledge and Evaluate Performance* section in Workforce Optimization.

Workforce Management

WFM provides real-time monitoring of contact center performance and agent-adherence. WFM allows you to manage agents, schedules and forecasts. For more information about Genesys WFM, see Workforce Management for Cloud.

Custom Integrations

Configure back-end integrations and SFDC connector integrations in Genesys Engage cloud.

ESM application	Genesys Engage cloud application
ELC custom integrations	Genesys Engage cloud custom integrations

EchoRelay back-end integrations (SOAP based)

ELC EchoRelay uses Simple Object Access Protocol (SOAP) interfaces for back-end integrations. As part of the migration process to Genesys Engage cloud, these back-end integrations are created as REpresentational State Transfer (REST) interfaces.

SFDC connector

CRM Gplus Adapter for Salesforce is a softphone for handling inbound and outbound calls, as well as other interactions such as chat or emails. You can launch the softphone from Contact management or ticket management system. For more information about CRM Gplus Adapter for Salesforce, see Gplus Adapter for Salesforce.