

# **GENESYS**<sup>®</sup>

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### Customer Care Mobile Application User Guide

Genesys Care/Support current

10/6/2022

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# Genesys Care Mobile App 2.0 Guide

The Genesys Care Mobile App 2.0 is intended to help you interact with Genesys more quickly and efficiently. After installing the Mobile App, you will be able to:

- Review your Open Cases (Support, Admin), including all public Case Updates
- · Post updates to your Cases and Escalations
- · Contact any of our regional Customer Care Centres
- Chat with the Owner of your Support Case (or an available agent, if the case owner is unavailable) (Multicloud CX/Genesys Engage and PureConnect)
- Request for Escalation and Case Closure
- View Alarms in your environment (Requires Remote Alarm Monitoring Genesys Engage)
- Subscribe for notifications on your company's cases (Critical or High), new Escalations, Maintenance alerts or Cloud Incidents (Multicloud CX)
- Review the notifications received in the past 3 days
- Favorite an account or a case for easy follow up or notification actions.

#### **Mobile App Video**

#### Link to video

#### **GDPR** @ Genesys

Genesys is strengthening existing controls for international transfers of data. Genesys has implemented restrictions for US employee access to end customer personal data for customers hosted in the EU region. As a result of this the case details having personal information will not be visible to the US Genesys Personnel and no case related actions can be performed.

### Installation

Prior to downloading the Genesys Care Mobile App, please complete the following:

- Ensure you have obtained a My Support account which is available on the My Support Registration page.
- Once you have your account, login successfully to My Support at least once.
- Confirm you are a Designated Contact or have Read-Only access. If you would like to check/change your existing My Support access level, login to My Support and click on down arrow next to your name in the upper right corner and select Manage Profile. Please see our My Support FAQs for more information regarding access levels.

Mobile Application Store Links:

Android - https://play.google.com/store/apps/ details?id=gcare.genesys.genesys\_care\_mobile&hl=en\_IN

iOS - https://apps.apple.com/us/app/genesys-care-2-0/id1520526271

After the Mobile App has been installed and opened, the app will display a splash screen with Genesys logo for a while and will be directed to the login screen.

You will be able to login in the application using

- My Support portal credentials (External Users/Customer)
- Genesys OKTA Credentials (Internal Users)

The credentials will be in form of email address and password combination. In case if you forgot the password, you can reset the password by clicking on the "Forgot Password" Link.

#### (left) Splash Screen (right) Login Screen

<b>u ▼ 1</b> 2:30	3:58 🕼 💐 🖏 58%
	$\bigcirc$
$\frown$	GENESYS CARE 2.0
	version TU. T.Z
	Email ID
$\smile$	
GENESYS CARE	Password
	2
	I accept the Terms & Conditions
	Sign In
	Forgot your Password?
	Need Help? care.mobile@genesys.com
	< • •

#### Mandatory Update of Mobile App

In certain circumstances involving software version dependencies, the app should be updated with the latest available version. The user will receive a popup on the home screen when the latest version of the mobile app is available. The user will need to install the new application to access the latest mobile app functionalities.

#### Share the App Feature

User can share the app to their peers via the App Menu -> Share the app option. This generates link that is shared to the peers that helps them to install the Genesys Care 2.0 application via the stores.

# Application Security

Genesys has a strict Privacy Policy that applies to the Genesys Care Mobile App.You will need to accept the Genesys Care Mobile App terms and conditions for login into the application. You can also view the Terms and Conditions by clicking on the link. The sign-in button will be enabled ONLY if you accept the Terms and Conditions.

In addition to the Mobile App Terms and Conditions that you agree to during installation, the Genesys Care Tools Terms and Conditions also apply to use of the mobile app.

If the device is in idle mode for 10 or more minutes, then the application will log out and you have the re-enter in to the application by logging in. Also, you have to login again if the app has terminated.

### **Biometric Authentication**

Biometric authentication is the way by which user authenticates into the mobile application using their device's biometric option such as Fingerprint or Face ID. This mode of authentication can be used in addition to the usual way of login using email and password. Biometric authentication eliminates the need for typing the lengthy email and password every time you get signed out of the app, thereby improving the accessibility of the app.

For enabling biometric authentication for the mobile app, user needs to activate Face ID/Touch ID/ Fingerprint security by adding their Face ID/Fingerprint via device settings. Please refer to your device manual on how to set up the fingerprint/face ID/Touch ID.

Once you have logged in to the application, you can see a ribbon stating "Enable Biometric Authentication" with a toggle button. If you switch on the toggle, you will be shown with the below popup to enable biometrics at device level if you haven't enrolled for it. Once opted in, the Enable biometric authentication ribbon will be hidden.

#### Finger print and Face ID authentication registration

#### **Biometric Authentication**



#### (left) Android (Right) iOS

Once validated, you will be enrolled for Face ID/Touch ID/Fingerprint authentication for the application.

#### **Biometric Authentication**



# Authentication Flow

Post registration when you open the application, you will be shown with a popup to verify your Fingerprint/Face ID in the application login screen. Upon successful validation, you will be redirected to the application home screen. At any point of time, you can opt out of biometric authentication by turning it off from the Settings screen of the application.

2:18 🔘	Carrier 🗢	3:34 PM	25
GENESYS CARE		GENESYS CARE	
Email ID prem.genesys@gmail.com Sign In Confirm fingerprint to login	Ema prer Passwe	Cancel	
Touch the fingerprint sensor		Sign In Forgot your Password?	

(left) Finger print for Android and (right) Touch ID for iOS

Enable/Disable Biometric in Settings Screen

▼⊿ ■ 12:30 ■ Settings
General
Name Hemnath Haridass
Email Address hemnath.h@genesys.com
Authentication
Enable Biometric authentication
Notifications

#### **Biometric Logout Flow**

If the user decides to log out after enabling Biometric authentication, they will be redirected to the below login screen for re-login using either biometric or regular login using email and password.



# Functionalities

Click on the functionality sub-tabs on the sidebar to learn about them. Please refer to the table below for appropriate access to Internal/External and Partner users against each functionality.

#### Multicloud CX/Genesys Engage

Features	Genesys Internal Users	Customer/End User	External - Partner
Review your Open Cases (Support, Admin)	*	*	*
Review all public Case Updates	*	*	*
Review internal Case Updates	*		
Post updates to your Cases and Company Cases	*	*	*
Post updates/Escalation to other Company Cases	*		
Request for Escalation	*	*	*
Request for Case Closure		*	*
Review the Notifications received	*	*	*
Favorite an account or a case for easy follow up or notification actions.	*	*	*
Subscribe for Case Notifications on cases	All Cases (If subscribed)	Personal Cases & Company Cases	Personal Cases & Account Cases
Subscribe for whole account Notifications for Critical/High Cases and Case Escalations	All Accounts (If subscribed)	Accounts based on Support Access & Support Access Cloud	Accounts based on Support Access & Support Access Cloud
Forgot Password option in Login Page		*	*
Bio-metric authentication support (iOS > v12.0 & Android > v9.0)	*	*	*
FeedBack/Contact-us/ Notification-Inbox/FAQ/ Help/Terms & Conditions	*	*	*
Chat with the Owner of your Support Case (or	*	*	*

Features	Genesys Internal Users	Customer/End User	External - Partner
an available agent, if the case owner is unavailable)			
Subscribe for Notifications on Cloud Incidents	All accounts that have cloud access	Accounts based on Support access cloud	Accounts based on Support access Cloud
View Alarms in your environment (Requires Remote Alarm Monitoring - Genesys Engage Premise only)	*	*	*
Subscribe for Alarm Notifications (Requires Remote Alarm Monitoring - Genesys Engage Premise only)	*	*	*
Settings Page the Alarm Notification have disable origin option		*	*

#### **Genesys Cloud CX**

Features	Genesys Internal Users	Customer/End User	External - Partner
Review your Open Cases (Support, Admin)	*	*	*
Review all public Case Updates	*	*	*
Review internal Case Updates	*		
Post updates to your Cases and Company Cases	*	*	*
Post updates/Escalation to other Company Cases	*		
Request for Escalation	*	*	*
Request for Case Closure		*	*
Review the Notifications received	*	*	*
Favorite an account or a case for easy follow up or notification actions.	*	*	*
Subscribe for Case Notifications on cases	All Cases (If subscribed)	Personal Cases & Company Cases	Personal Cases & Account Cases
Subscribe for whole account Notifications for	All Accounts (If subscribed)	Accounts based on Support Access &	Accounts based on Support Access &

Features	Genesys Internal Users	Customer/End User	External - Partner
Critical/High Cases and Case Escalations		Support Access Cloud	Support Access Cloud
Forgot Password option in Login Page		*	*
Bio-metric authentication support (iOS > v12.0 & Android > v9.0)	*	*	*
FeedBack/Contact-us/ Notification-Inbox/FAQ/ Help/Terms & Conditions	*	*	*
Chat with the Owner of your Support Case (or an available agent, if the case owner is unavailable) (Genesys Engage and PureConnect Only)			
Subscribe for Notifications on Cloud Incidents			
Settings Page the Alarm Notification have disable origin option			

#### PureConnect

Features	Genesys Internal Users	Customer/End User	External - Partner
Review your Open Cases (Support, Admin)	*	*	*
Review all public Case Updates	*	*	*
Review internal Case Updates	*		
Post updates to your Cases and Company Cases	*	*	*
Post updates/Escalation to other Company Cases	*		
Request for Escalation	*	*	*
Request for Case Closure		*	*
Review the Notifications received	*	*	*
Favorite an account or a case for easy follow up	*	*	*

Features	Genesys Internal Users	Customer/End User	External - Partner
or notification actions.			
Subscribe for Case Notifications on cases	All Cases (If subscribed)	Personal Cases & Company Cases	Personal Cases & Account Cases
Subscribe for whole account Notifications for Critical/High Cases and Case Escalations	All Accounts (If subscribed)	Accounts based on Support Access & Support Access Cloud	Accounts based on Support Access & Support Access Cloud
Forgot Password option in Login Page		*	*
Bio-metric authentication support (iOS > v12.0 & Android > v9.0)	*	*	*
FeedBack/Contact-us/ Notification-Inbox/FAQ/ Help/Terms & Conditions	*	*	*
Chat with the Owner of your Support Case (or an available agent, if the case owner is unavailable) (Genesys Engage and PureConnect Only)	*	*	*
Subscribe for Notifications on Cloud Incidents	All accounts that have cloud access	Accounts based on Support access cloud	Accounts based on Support access Cloud
Settings Page the Alarm Notification have disable origin option			

# Settings

Once you have downloaded the Genesys Care Mobile App, you can adjust the app settings by launching the settings from Application Menu > Settings.

The settings screen provides the below information and options.

#### • General

- Name Displays the User's name. Non-Editable.
- Email Address Displays User's email address. Non-Editable.
- Timezone Displays User's Timezone. Non-Editable. This timezone value is obtained from Salesforce. All the date time values within the application such in Case Details, Alarm and Notification Inbox Screen will be displayed based on this timezone value. User needs to contact our Customer Care in order to update this time zone value.

#### Authentication

• Enable Biometric Authentication - Option to enable/disable biometric authentication for the application. On switching the toggle button to ON state, the registration flow like the one described in Biometric Authentication section takes place. On successful verification, biometric authentication will be enabled for the application.

#### • Home

• Quick View - Option to enable Quick View of cases based on the case status in the Home Screen

#### • Cases

• Set My Cases - Option to make My Cases as default landing screen in All Cases tab

#### Notifications

- Case notification Option to enable/disable notification for any case updates happening to the user created cases of external users and user owned cases of internal users.
- Alarm notification Option to enable/disable notification for any new alarms arising in user's environment based on user's preference. On enabling the alarm notification toggle, pop up with options like the alarm filter will be shown.
  - Alarm Severity All, Critical, Major and Minor
  - Disable Origin List of Origins
- Maintenance Alerts Option to enable/disable notification for maintenance related alerts from JIRA.

#### • About

• App Version – Application current version detail



# Home Screen

Once you have successfully logged in, you will be directed to the Home Screen of the app. The home screen shows users latest broadcast/announcement, quick view of the cases based on the case status and paves way for faster navigation to go to cases, favorite cases or Accounts, Alarms of your environment or Notification Inbox. By clicking on the broadcast, users will be shown with the broadcast details. Users can view the broadcast/announcement later via the broadcast/ announcement menu.

Please note that the Alarm Monitoring function is only available to On-Premise Remote Alarm Monitoring subscribers.

Users can use the Floating Search button specified on the bottom of the Home page to search for Accounts and Cases. This provides a global search option for searching accounts with the account name and case with case #. Users can search for Open Cases, Closed Cases and Accounts. This search by default returns result for the past 1 year. Users can modify the date range filter to search for cases based on the created date from previous years.

Once the search results are listed, the users can click on the list item to view the case details for a case or case list for an account. This search option will be available across the application.

#### Functionalities



5:08	♥∡ 🔒 43%
← 2907	×
000 <b>2907</b> 681 test for voice	CASE ★
000 <mark>2907</mark> 511 test for genesys engage cloud	CASE 🕁
000 <mark>2907</mark> 510 test for genesys engage cloud	CASE 🕁



### Cases

When you select Cases from the Home Screen or  $\equiv$  Menu of the Genesys Care Mobile App, you will see a list of your non-closed cases, including cases opened by other Designated Contacts at your company, and be able to perform other functions.

The following are the different functions that you can perform from the *Cases* window.

### Designated Contacts and Case Management

From the Cases screen, Designated Contacts should select "Show Only My Cases" toggle to view cases they have opened. By default, the list shows all the non-closed company cases. On toggle of "Show only My Cases", a popup will be shown to set the My Cases as default landing screen in All Cases tab. If needed, user can opt for this and they can revert it via Settings screen. You can select any case to view the case details including the case severity level, case number, Case Status, Account Name, Product Support Group, Last Modified Date and Sub-Status. The case list is populated in priority categories as Prod Down, Critical, High, Medium and Low. The cases that are in Awaiting Info and Solution Proposed status that exceeded 24 hours without response will be highlighted in order to denote that user needs to take some action on those cases.

The Case List screen comes with a very handy filter option to choose specific cases from the list. To access the filters, click on the triple dot icon on the top right corner of the cases screen and then click Filter Cases option in the menu. The various options and the descriptions are provided below.

- Read/Unread To view the cases those are updated and not updated
- Priority: Prod Down/Critical/High/Medium/Low To view the cases based on specific priorities
- Status: Open/Awaiting Info/Solution Proposed To view the cases based on the case status
- Platform: Genesys Engage/Multicloud CX/ Genesys Cloud CX/Genesys DX/PureConnect To view the cases based on the case platforms

Once you click on apply, the filters to view specific set of cases of your interest. If you want to reset the filters back to default, you can just click on the "Clear Filters" on the top right corner of the Filters screen.

If you are a Genesys partner who is a Designated Contact, the case list view can include all nonclosed cases that your company has opened for all the end users your firm represents.



#### **Case List Screen and Filters**

The Case List also comes with Sort option that sorts the cases based on Priority and Last Modified. To access the sort option, click on the triple dot icon on the top right corner of the cases screen and then click Sort By option in the menu, then select the required sorting option in the next menu.



### Favorites

If you want to access some cases frequently to stay on top of them, you can use the "Favorites" tab to add the cases that you want as favorites. Initially when you land on the Favorites tab by clicking on it, you will see a notification that No Favorites are found. Click on the global search button and input the case number or the account you would like to favorite.



If you are the end user of the Genesys platform, then you can search for your company cases for which you have access to. If you are a partner user, then you can search for an account or company cases for those you have access to. In case if user favourite case and remove access to it, then user will be shown with Access Denied for that particular account and user will be not be able to access it.

#### **Favorites Screen**

When the case or Account Name is searched in the search bar, you can favorite the case/account by clicking on the start button present on the right-hand side against the case/account name. When a Case is added to Favorites, the case notifications subscription will be enabled.

Once an account or case is marked as favorite, it will be displayed in the My Favorites section of Account/Cases tab. You can view the case list of Favorited account or case details of Favorited case by clicking on these cards. You can add as many as 20 favorites which includes both Accounts and Cases. If you want to add a new favorite and it has reached a limit of 20, then you must remove one of the existing favorites and then add the new one. The case subject will not be shown for the cases that are GDPR restricted for the user who logs in.

When a Case or an account is removed from Favorites, the case or account notifications subscribed will also be removed. A confirmation popup will be displayed to get the user input, as displayed below.



### Case Details

You can view the details of a case by clicking on the case from the case list. The case list page contains details about the case along with the updates posted on the case. If you need more details on the case, you can click on the Expand (Downward arrow) icon to expand the details section. The bottom of the case details screen has an expandable menu indicated by a downward arrow. It has the below functionalities.

- Post updates Post updates to a case
- Chat Chat with the owner of the case or any available analyst if the owner is unavailable.
- Escalation Request to escalate a case for critical attention
- Case Closure Request to close a case.
- Call Redirects to the Genesys Contact Us page to choose the appropriate Toll Free numbers.

You can also opt to receive notification specifically on a case by Enabling Notification on the case

details screen. Whenever there is an update happening, a notification will be sent to the app.

The email updates on the case updates section will be displayed only with the subject. For viewing the entire email updates, you need to select on More Info option. This will show the entire update in separate modal window.

Users can long press on the case details and updates to select & copy the text to share it while posting case updates.

Carrier 🗢	4:26 PM	- 4 <del>.</del>	Carrier 奈	1:07 PM	_
← 000267 <sub>Open</sub>	74461	Å	÷	0002951057 Solution Proposed Exceeds 24 hrs	☆
Enable Notific Toggle switch to e	ation mable case notification	-	Descr	iption	
Details					
Subject	notification test case 3				
Sub Status	New				$\bigcirc$
Priority	1-Critical				
Case Owner	Oleg Fylypenko		Case	Updates	
		<b>v</b>		Real Brin Bagarages	
Description				Hello	
notification test ca	se	0	Email	Thank you for raising this case with Genesys Customer Care: 0002951057 - Customer No	I
No Coso Linda	tos			Mo	re Info
No Case Upda	les				
Post Chat	Call Escalation	×] Closure	Case Post	Chat Call Escalation (	×] Closure

As a part of General Data Protection Regulation (GPDR), the PII data of the EU/EEA customers will not be accessible by Genesys US personnel. When the Genesys US personnel access the Case details screen of EU/EEA customer, the below screen will be displayed to restrict the information. The case related functionalities like Post Update, Chat, Call, Escalation and Closure will not be available for access.



#### **Escalation Details**

The escalation banner will be shown to the users if there is an active escalation for the case. Users can click on the escalation banner to view the escalation details and escalation feeds.

Enable Notific Toggle switch to enotification	ation nable case	Reason	Reoccurring Issue
		Date	01 Jun 2022 18:00:37
Escalation Escalated on	> 01 Jun 2022 18:00:37	Requester	No. Second
	)	Status	In Progress
Case Details			
Subject	add test user	Escalation Fe	ed
Case Owner	Malay in the solution	PSS De 13 Jul 2	emo 022 5:45 AM
Sub Status	New	Post Test Es	scalation Feed
Priority	1-Critical		
Description			
	<b>ে এ</b> ব		R
	Call Escalation Closure	P	ost Escalation Feed

Any communication regarding the Escalation will be captured in the Escalation Feed section of the Case. There will now be 2 feeds on the Case.

- The Case Feed will capture the technical aspects of the Case.
- The Escalation Feed will capture the communication flow of the Case Escalation.

Users can post their escalation feed by selecting the Post Escalation Feed action in the escalation screen.

er 🗢 11:15 AM	
Post Escalation Feed	×
Enter the feed here	
	0/1500

#### **Post Case Updates**

You must be a Designated Contact to post updates to an open case.

To post an update to a case, tap on the Post Update icon on the expandable menu on the bottom of the Case details screen. On the Case Updates screen, type your update in the message text box and then press Submit.

Carrie	er 🗢 4:27 PM	<b>4</b>
		840
		M
Ca	ase Updates	
	Ben Reynolds 06/08/2020 16:25:01 GMT	
	Eve updated the JIRA requesting an update from Alexey, who is the DEV assigned to the issue.	e Ië
Ρ	Post Updates	×
ſ	Case updates to post.	
	Submit	

#### Post Case Update Screen

### Chat (Multicloud CX/Genesys Engage and PureConnect Only)

You must be a Designated Contact to use the Chat feature.

#### What is Chat?

Chat is a feature that gives Designated Contacts an additional option of engagement with the assigned Case Owner (or an available agent, if the case owner is unavailable) regarding the status of their Genesys Engage, Multicloud CX & PureConnect Support Cases. A Chat session is requested by clicking the Chat icon within any non-closed Case. The Using Chat section explains how to use Chat via the Genesys Care Mobile App only. As a reminder, Chat is for Case facilitation (quick questions or status updates) and not for live troubleshooting.

Please read the Support Processes for On-Premises Licenses for additional tips on Chat via Computer.

#### Important

Customer Care assigns Case Owners based on product knowledge that is available globally. You may have a Case Owner that is in a different time zone than you. In this instance, live Chat for that Case might not be available during your local business hours. In such situations, the chat will then be routed to an available agent. If both the case owner and the agents are unavailable, then after queuing for 60 seconds the chat window will present an option to leave a contact phone number. This number will be saved to the case, for the case owner to contact you. Management will also receive an email alert to inform them of the same. The contact number will also be included in the email alert.

### **Using Chat**

Select and open any non-closed Case. Navigate to the expand icon at the bottom of the screen and click the Chat icon to begin. A popup window with title 'Starting a chat' will appear. Click on proceed to start the chat. The Chat window will automatically start loading. **If the case owner is available**, you can directly begin the chat session. **If the case owner is not available**, then the chat will be routed to an available agent. If both the Case Owner and the other agents are unavailable, you can leave a contact phone number so that we can get back to you. **Once you have finished chatting**, you can end your session by clicking the "End Chat" button above your chat dialogue.



#### **Chat Option Screen**

#### **After the Chat Session**

After you end the Chat, a transcript of the Chat session will be emailed to you.

### Case Closure and Escalation

You must be a Designated Contact to request a case be closed or escalated.

#### **Case Closure:**

To request that Customer Care close a case, select the case closure option from the expanded menu on the bottom of the case details screen. In the Case Closure window, select the appropriate reason for the closure and click submit. Once submitted, users will be shown with celebrate popup.

← 0002/44038	Å
Case Closure X	
Problem Resolved	
Reasons*	
Please specify your reason here	
Cancel Submit	
Can't Provide Info	
O Not Relevant	
	6-

#### **Case Closure Screen**

#### **Case Escalation:**

To request that Customer Care escalate a case, select the Escalation Icon from the expanded menu on the bottom of the case details screen.

In the Request Case Closure window, select the Escalation Request option. The Escalation Request window will appear. Select an appropriate reason from the Escalation Reason drop-down list and provide the escalation details. Click Submit which will send your escalation request to Customer Care.

Cancel	Cancel

1:34	🗢 🗖	1:34	🗢 🗖
0002684733 Open	☆	← 0002684733 <sub>Open</sub>	
Enable Notification Toggle switch to enable case notification		Enable Notification Toggle switch to enable case notification	0
Case Escalation	×	Case Escalation	×
This escalation will be sent to our techn management team for review and to tak the urgency/impact of your issue has ch request a change to the priority of the c notes or by calling our Support Team.	ical support e action on. If hanged, please case via the case	This escalation will be sent to our technical management team for review and to take ac the urgency/impact of your issue has chang request a change to the priority of the case notes or by calling our Support Team.	support tion on. If ed, please via the case
If this is an emergency, please call our S for immediate assistance	Support Team	If this is an emergency, please call our Supp for immediate assistance	ort Team
Escalation Reason*		Escalation Reason*	
Select your reason	~	Project Blocker	
Please provide more details around your escalation request and the business impact. Please include any critical dates/times an update/resolution is needed by.		Lack of updates/progress	
Escalation Details*		Security/Stability Issue	
		Reoccurring Issue	
		Urgency/Impact has changed	
		Other	
Cancel	Escalate Case	Cancel	ilate Case

1:35	
0002684733	
Case Escalation	×
This escalation will be sent to our te management team for review and to the urgency/impact of your issue has request a change to the priority of th notes or by calling our Support Team	chnical support take action on. If s changed, please he case via the case n.
If this is an emergency, please call o for immediate assistance	ur Support Team
Escalation Reason*	
Project Blocker	~
Project Go-Live Date*	
31 May 2022 14:30:00	Ħ
Please provide more details around y request and the business impact. Pli critical dates/times an update/resolu	your escalation ease include any ition is needed by.
Escalation Details*	
Escalating this case as this is project blocker	becoming a
Cancel	Escalate Case

**Case Escalation Request Screen** 

### Notifications

You must be a Designated Contact to subscribe to this feature.

### **Push Notification**

This feature allows you to subscribe for the following notifications,

• Case Update Notification for an Individual Case

- Case Update Notification for all Personal Cases
- Case Update Notification for all the cases of a particular Account (Account Notification)
- Cloud Incident Notification

#### **Case Update Notification - for an Individual Case:**

Users can subscribe to receive update notifications of an individual case from the **Case Details** screen. Once subscribed they will receive notifications whenever there is an update to that case.

#### Steps to Subscribe/Unsubscribe

- To subscribe for updates of a case, open the Case Details screen of that case.
- Click the "Enable Notification" toggle to switch on the notification.
- To unsubscribe from the case update, set the toggle off again.

Carrier <del>\$</del> ← 00026744 Open	4:26 PM 461	±5,6%
Enable Notification Toggle switch to enable	ON le case notification	•
Details		
Subject	notification test case 3	1
Sub Status New		
Priority 1-Critical		
Case Owner	Oleg Fylypenko	0
Description		
notification test case		0
No Case Updates		
Post Chat	Call Escalation	× Closure

#### **Case Details Screen having Case Update Notification option**

#### Sharing Case Info via Mobile App:

Users can share the case info by clicking on the case share icon in the top right of the case details screen - app bar. On clicking this user will be provided to select the option to select the application via which they are interested to share the case info with their peers.

3:21 <b>G</b>	)		≎∡ û	93%
			샀	
Enab Toggi	e Notificatio	n e case notification		
Detai	ls			
Subjec	t	INC1127026		
Case 0	wner	Karthikeyan Pitchai		
		Share		

Genesys Care 2.0: A user has shared the Case # 0002905993 with you. Access the details via the link - h...



Once shared on clicking the link, it opens the application and redirects user to the particular case details screen of the shared case. In case if the user doesn't have application installed in their device, this redirects to the Genesys Care 2.0 app page in the Play Store or App Store based on the device type.

#### **Case Update Notification - for all Personal Cases:**

Users can subscribe to receive update notifications of all their personal cases from the **App Settings** Screen. Once subscribed they will receive notifications whenever there is an update to any of their personal case.

#### Steps to Subscribe/Unsubscribe

• Navigate to the Application Menu > Settings screen in your mobile.

- Enable the Personal Case Notifications toggle button.
- To unsubscribe from all the Case notifications, disable the same toggle button.

12:11 🕈 🔳	
$\equiv$ Settings	
🕒 General	٦
Name PSS Demo	
Email Address genesys.pss@gmail.com	
Authentication	1
Enable Biometric Authentication	
🚔 Cases	
Set My Cases Make my cases view as default landing page in All Cases	
* Notification	1
Personal Case Notification	

#### Personal Case Update Notification option

#### Important

When a user has subscribed for all personal cases through the Case Notification option, the Enable Notification toggle in the individual Case Detail screens will be ON. This denotes that the user has already subscribed for it.

#### **Account Notification**

Users can subscribe to receive update notifications for all the company cases of an account through the **Accounts** screen.

#### **Case Filter and Sort Option**

User can use the filter and sort option to filter and sort the cases as similar to the All Case screen.

#### **Steps to Subscribe/Unsubscribe**

- Search for an account and mark it as favorite (optional). On the top right corner of the account screen, click the settings icon > Enroll Notification.
- Click the toggle "Account Push Notifications" to ON state.
- Select the categories for which you would like to receive notifications. The categories currently supported are,
  - New Escalations By enabling this option, you will receive notifications if there are any escalation to the existing cases
  - New Critical Cases By enabling this option, you will receive notifications if there are new critical cases created for this account
  - New High Cases By enabling this option, you will receive notifications if there are new high cases created for this account
- Click on Apply. You will start receiving notifications from the app if any of the above conditions are met.
- By Default, the Account Push Notifications toggle option will be set to OFF including the sub- categories.
- To unsubscribe from the account's case updates, click the same settings icon and disable the New Escalations, New Critical Cases, and New High Cases toggle options as per your need. Disabling all three will in turn disable the Account Push Notifications toggle

4:39 🛈 🗖	❤⊿ 🛿 62%			
← Premier Financial	Filter Cases			
0002907681	Enroll Notifications	12:27		. ≑ ■
Subject: test for voice	Sort By	← Geni	Genesys Customer Care Platform	9
Critical   ③ 16d   C Solution Pre	posed/Fixed-Software	00029016 Genesus Cus	Cloud Incident Notification	
0002907511		Subject: TIM	Account Push Notification	
0002907311		• High S 2r	Escalations	
Subject: test for genesys engage	cloud	00027403	Critical Cases	
High   ③ 29d   C Open/Investig	ation	Genesys Cus Subject: GKC	High Cases	
0002907510		• High   © Br		
		00028796		
Subject: test for genesys engage cloud		Genesys Cus		
High () ~1mo C Open/invest	ligation	Subject: Spe		
		Medium G		
		00028794		
		Genesys Cus		
		Subject: Spe		
		Medium G		
			Submit	ancel

#### **Account Notification option**

#### **Cloud Incident Notification**

You can subscribe to receive update notifications for Cloud Incidents for the cloud accounts that you have.

#### Steps to Subscribe/Unsubscribe

- Search for an account and mark it as favorite (optional). On the top right corner of the account screen, click the settings icon.
- Click the toggle "Cloud Incident Notifications" to ON state.
- On enabling account notification users will be able to receive the notification When cloud incident is created in Service Now for that account.
- By Default, the Cloud Incident Notifications toggle option will be set to OFF.
- To Unsubscribe, follow the same steps as above and toggle OFF the Cloud Incident Notifications. Once done, the users will not be able to receive the Cloud Incident Notifications anymore.

#### **Cloud Incident Notification option**

#### Important

The Cloud Incident toggle will be enabled ONLY if there is cloud deployment for the account. For the users having only premise accounts, the Cloud Incident notification toggle button with be disabled.

# Alarms

If you are an on-premises user and have Remote Alarm Monitoring with Workbench, you will be able to access the Alarms and Alarm Notifications feature. You can view alarms and also set up alarm notifications.

### Alarms Screen

You can view the Alarm Monitoring Screen by selecting Alarm monitoring from Application Menu from Home screen.

The Alarms list will populate based on a default view of all alarms by date received (descending order with most recent first). From the list, you will see a summary of key alarm information such as Alarm Severity, Server, App Name, Modified Date/Time, Description and Status.

#### **Customizing the Alarms List View**

You can also choose to customize the list of alarms that you wish to see on the List screen. The screen comes along with filtering option to filter the alarms based on various categories such as,

- Alarm Type All/Active/Closed
- Alarm Severity Critical/Major/Minor
- Time Interval Start Time; End Time
- Disable Origin List of server origins

You can view the filters by selecting the menu icon in the top right corner or by swiping left from the Cases tab. Once selected and applied, you can use the Reset filter option to reset the alarm filters.



(left) Alarms List Screen, (right) Filter Alarms Screen,

### Alarm Details

Tap on the alarm on the alarms list screen to view the details of that specific alarm. The alarm details will be populated as an expanded ribbon.



#### **Alarm Details Screen**

### Alarm Notifications

Included with Remote Alarm Monitoring with Workbench is the benefit of receiving alarm notifications. To enable, tap the Menu icon  $\equiv$  and select Settings. From the Settings screen, select Alarm Notifications and then check the Enable Alarm Notifications box. You can also select which alarm severities to be notified about.

▼⊿ ■ 12:30 ≡ Settings	▼⊿ ■ 12:30 E Settings
General Name Hemnath Haridass	Enable Biometric authentication
Email Address hemnath.h@genesys.com	Notifications
Authentication	Case notification
Enable Biometric	About
Notifications	App Versions 8.33

Carrier <rh></rh>	OFRUG
prem.genesys@gmail.com	
Authentication	
Enable Biometric Authentication	
Alarm Notification	×
Choose Severity	
Critical Major Minor	
Disable Origins	
Origins	•
EMEA_Frimley	
Submit	

#### (left) Settings Screen and (right) Alarm Notifications Screen

### Multiview Alarm List for Partners and Internal Users

If you are a Genesys Partner or Internal User managing more than one end user with Remote Alarm Monitoring, you can view all your customers and their active alarms.

The Alarms screen will not have a list but will have a search option. Search for the account for which the alarms need to be displayed. Select the account and you can view the list of alarms for the account.



**Alarms Search for Accounts** 

# Notifications Inbox

Just to keep you updated on the notifications, the Inbox will help you to view the past notifications you have received. You will be able to see the past 3 days of Notifications of all categories (Case Update, Alarms, Cloud Incident and Account Notifications). You can view the Notification Inbox by selecting the Application Menu - Notification Inbox. This loads the Notification Inbox screen with list of notification with below details for each notification

- Notification Subject
- Notification Type
- Notification Received Datetime
- Notification Message

On click of the notification item, you will be redirected to the corresponding screens based on notification types.

- Account Notification Favorite Account Screen
- Case Update Notification Case Detail Screen
- Alarm Notification Alarm Screen

Users will also be able to filter the notification by clicking the filter icon on the top right side of the screen. The filter can be applied on the following categories.

- Account Name
- Notification Type
- Account
- · Case Critical, High, Medium, and Low
- Alarm
- Cloud Incident
- DateTime Received Start Date to End Date

1:24	💎	-
≡ N	otification Inbox	荘
NOTE: Noti the notifica	fications will be available for 3 days, post th tions will be deleted automatically.	is 🚫
Case	0002950908 24 May 2022 8:07 AM (Received) New feed in case #0002950908 (2-High) for HSBC Global Services (UK) Limited Subject: NGTV2.5 - Infomart / GI2 reports over counting calls when	0
Case	0002978506 19 May 2022 10:26 AM (Received) Case #0002978506 (3-Medium) escalated for Genesys - Cloud Operations Team Subject: Genesys Cloud Wallboards	0
Case	0002978506 19 May 2022 10:21 AM (Received) New feed in case #0002978506 (3- Medium) for Genesys - Cloud Operations Team Subject: Genesys Cloud Wallboards	0
Account	HSBC Global Services (UK) Limited 15 Mar 2022 7:03 AM (Received) Case #0002930820 priority updated to 1- Critical Subject: NGT 2.5 - URS EWT calculation is wrong modified	0
Case	0002853426 16 Jun 2021 4:15 AM (Received) New feed in case #0002853426 (1- Critical) for National General Management Corp.	2

User can delete the notification item using delete icon in the notification item. By doing long press on a notification item, user can select multiple or all notification and delete them.

1:24 🕈 🗖	
← s	elected
NOTE: Not the notifica	ifications will be available for 3 days, post this 🚫 tions will be deleted automatically.
Case	0002950908 24 May 2022 8:07 AM (Received) New feed in case #0002950908 (2-High) for HSBC Global Services (UK) Limited Subject: NGTV2.5 - Infomart / GI2 reports over counting calls when
Case	0002978506 19 May 2022 10:26 AM (Received) Case #0002978506 (3-Medium) escalated for Genesys - Cloud Operations Team Subject: Genesys Cloud Wallboards
Case	0002978506 19 May 2022 10:21 AM (Received) New feed in case #0002978506 (3-Medium) for Genesys - Cloud Operations Team Subject: Genesys Cloud Wallboards
Account	HSBC Global Services (UK) Limited 15 Mar 2022 7:03 AM (Received) Case #0002930820 priority updated to 1- Critical Subject: NGT 2.5 - URS EWT calculation is wrong modified
Case	0002853426 16 Jun 2021 4:15 AM (Received) New feed in case #0002853426 (1-Critic for National General Management Corp. Subject: [NGIC] Agents Unable to Pick Up

# Help Screen

This screen helps you to refer the Mobile App guide. This is populated from Help option in Application Menu. This will load the mobile app user guide User Guide within the application.

Carrier 🗢 5:26 PM 💭
?
For the current version of the Mobile App Guide on how to use this App, please go to:
https://docs.genesys.com/Documentation/ST/latest /MobileUser/Welcome

# FAQ Screen

You can view the FAQs screen by selecting the Application Menu > FAQs. This screen has the frequently asked questions along with the Answers. On landing in this screen, you will be shown with the list of questions. On selecting the expandable icon, the answer for the specific question will be displayed.

arrier 穼	5:26 PM	<b>2</b>
≡ FAQs		-50
How to enable Fingerprint sca	Biometric Authentication – Face ID/ an?	^
To enable biom your fingerprin device first, if	netric authentication for Mobile app, nt/face data should be registered in yo you have not done that already.	ur
<ul> <li>For Android Screen &amp; Pas Fingerprints" using Android</li> </ul>	d, go to the settings page -> Lock sword. Navigate to "Manage or "Add Face Data" in case you are d.	
<ul> <li>For IOS the to Settings -&gt; then enter yo continue to for screen to reg</li> </ul>	<ul> <li>biometric can be added by navigatin</li> <li>Tap Settings &gt; Touch ID &amp; Passcode</li> <li>pur passcode. Tap Add a Fingerprint a</li> <li>ollow the instruction as provided on the instruction as provided on the instruction.</li> </ul>	g , nd ne
Once the devic on login in to the click on "Enable part of the app Biometric (Eac	ce is registered with the biometrics, ju the mobile app with the password and le biometric authentication" on the to o. A popup is shown to activate a ID/Guide ID/Eingerright	p
authentication already enable are validated for painful passwo	for their future login if they have ad biometric at device level. Once you or the biometric, that's it, no more ords!!!	
What If I don't anymore?	need Biometric authentication	<b>~</b>
What are the d opt in?	different types of Notifications to	~

# Feedback & Support Screen

You feedback is utmost important to us. You can provide your rating and feedback using the Feedback screen so that we can consider that as General Feedback, Features & Suggestion or Technical help.

Carrier 🗢	5:42 PM	-
≡ F	eedback & Support	
	Hello Friends	
Your	review will help us to give you a better experience	
۲	General Feedback	
0	Features & Suggestions	
0	Technical help	
	****	
Enter y	our feedback here	
	Is it ok if we contact you on this topic?	

Surprise feedback popup will be shown to the user in few of the app screens while they navigate in the application. On clicking Ok, user will be redirected to the feedback screen.

#### Functionalities

Carrier 1	<u> </u>	4:06 PM	
=	Cases		
	My Cases	Favorites	
* M	ly Favorites		
	Your Feedbac impo	k & Suggestions are ortant to us!	l
k	**	***	
I.	This will help application and s take you to	o us to improvise our serve you better. Can we our feedback page?	١
		Ok	1
	Rem	ind Me Later	ы
		Cancel	
2	Sub: Support / expire in 14 da	Access SA-2116016 will ( ys- Test Contact	3
	0002971234 Petfre (Gibralta	ar) Limited (EU)	9

### Contact Us

You can view the Contact Us screen by selecting the Application Menu > Contact Us option. This screen shows the list of phone numbers based on the regions for all the below platforms,

- Mutlicloud CX
- Genesys Engage
- Genesys Cloud CX
- Genesys DX
- PureConnect

You can search for phone numbers using the region names. On selecting any of the list item, it navigates the user to the default dialer screen from where users can place the calls to speak with an agent.

12:	Contact Us
Q	Search contacts
ľ.	Toll-free, North America (USA & Canada) +1-888-369-5555
ľ	United States +1-317-715-8600
l.	North America (USA & Canada) Collector +1-866-396-2599
l.	North America (USA & Canada) Collector +1-317-715-8448
l.	Europe, Middle East, Africa International +44 (0) 127-645-7002
ر	Netherlands +31(0) 206-500-001
ر	Saudi Arabia +966 (0) 112-502-998
ľ.	Asia Pacific International +63-2-8864-3333
l	Australia +61-7-3368-6868

# Troubleshooting

### **On-Premises & Cloud Users**

If you experience any issues such as Authentication Failed, you can:

- Open a Support Case in My Support (select Product Category = Genesys Care Tools and Product = Mobile Application).
- Email care.mobile@genesys.com