GENESYS™

UC Connector Deployment Guide

Voice Scenarios

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Voice Scenarios

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The UC Connector integration supports voice interactions between the Knowledge Worker, the contact center agent, and the customer. This can involve direct calls from the customer to the enterprise customer service function, or transfers and conference calls initiated by the agent. Knowledge Worker transfers to agents in the contact center are also available, as well as transfers and conferences between Knowledge Workers.

Contact Center to Knowledge Worker

In this scenario, either a customer calls directly into a number that maps to a group of Knowledge Workers engaged in customer support (bypassing the contact center) or a contact center agent engaged in a voice call with a customer decides that help from an expert outside of the contact center is needed, and so initiates a call transfer. In both cases the interaction can go either to a particular Knowledge Worker, or more commonly to a group of Knowledge Workers.
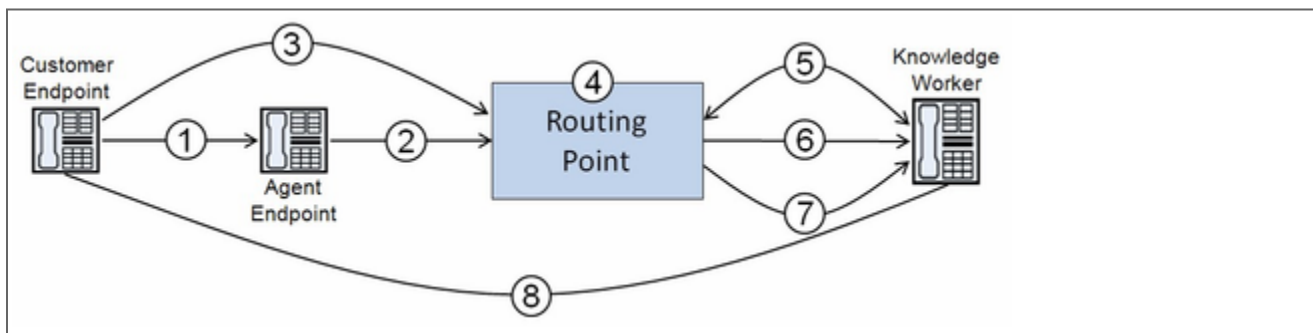
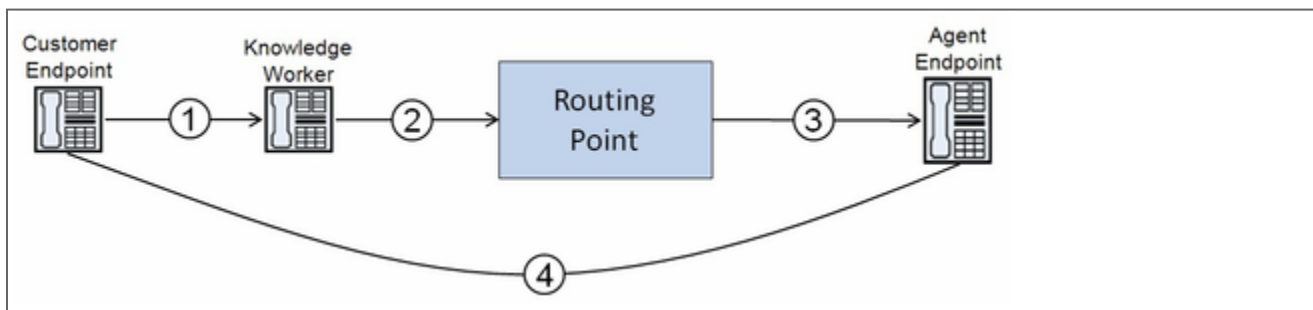The call flow for this scenario is as follows:

1. The customer dials the contact center and a voice channel is established with a particular agent. Regular Genesys call distribution from a Routing Point or ACD Queue determines which agent will handle the customer interaction.

2. The agent decides that a Knowledge Worker is needed to satisfy the customer interaction. From their Interaction Workspace, the agent initiates a call transfer to a designated Knowledge Worker Routing Point DN.

3. Or, the customer contacts an Enterprise Customer Support number directly, which does not involve the contact center.

4. The routing strategy loaded onto this Routing Point DN determines how the particular Knowledge Worker is selected. You can design the strategy so that:

   • The agent specifies the specific Knowledge Worker that they need.

   • The routing strategy selects a particular Knowledge Worker from a group, using a round-robin approach based on worker availability. This distributes the workload, making sure the same expert is not overused (recommended approach).

   • The routing strategy sends or "broadcasts" multiple Preview Notifications simultaneously to a group of Knowledge Workers. The interaction will be routed to the first Knowledge Worker who accepts.

5. Presence monitoring (through integration with Genesys Stat Server and Management Layer) determines which Knowledge Workers are currently available, and this information is made available to the routing strategy.

6. Using the presence information, the routing strategy selects an available Knowledge Worker.

7. Universal Routing Server (URS) sends a Preview Interaction to the selected Knowledge Worker screen pop arrives at the Knowledge Worker's desktop or device, asking if they will accept the interaction.

   - If the Preview is accepted, the customer call is then routed to the Knowledge Worker and a new voice channel between the customer and enterprise expert is created.

   - If the Preview is declined, URS can apply default routing or select another available Knowledge Worker for Preview, depending on the strategy.

Knowledge Worker to Contact Center

In this case, the Knowledge Worker is already involved in a customer call—typically after a successful transfer from contact center to Knowledge Worker earlier in the customer interaction. For whatever reason—to collect more user information, for example, or process a new order—the Knowledge Worker decides it is necessary to transfer the customer back to the contact center.

To do this the Knowledge Worker can use the UC Connector client window in her browser to send the call to an agent in the contact center. Regular Genesys routing is used to select a particular agent—for example, the Knowledge Worker sends the call to a Genesys Routing Point DN, where the strategy selects a particular agent based on skill, group, and so on.
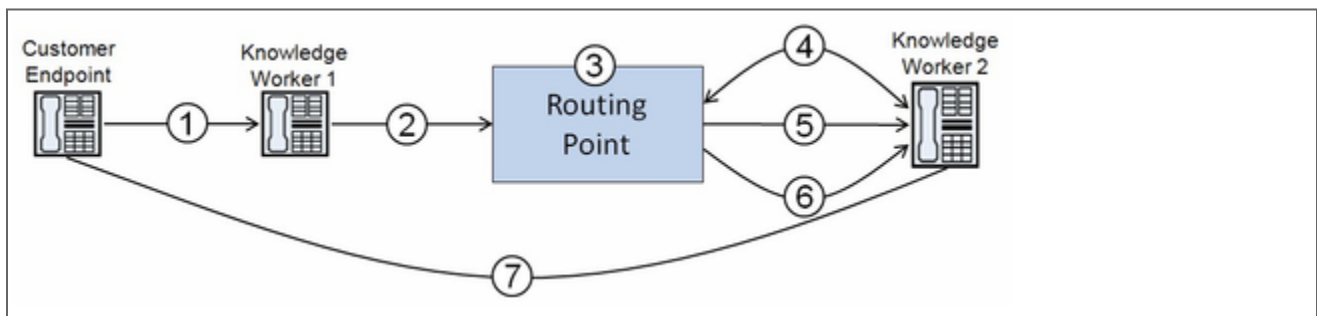

A common call flow for this scenario is as follows:

1. A Knowledge Worker is engaged in a voice call with a customer, with no other party or contact center agent involved (in other words, this is not a conference or consultation call with the initiating agent still involved).

2. The Knowledge Worker decides that the call should be sent to the contact center, either back to the original agent who started the customer interaction, or for further processing by the contact center (for example, to an IVR for a customer satisfaction survey).

3. To initiate the transfer, the Knowledge Worker uses the Interaction window to select a configured UC Connector contact point. This contact point is mapped to a `Routing Point` DN in the Genesys environment.

4. Once the call arrives on the `Routing Point` DN, the routing strategy loaded on the DN is responsible for selecting an available agent, configured for the business rules of the contact center.

5. Connection between customer and selected agent is established.

Knowledge Worker to Knowledge Worker

In this case, a Knowledge Worker already engaged on a customer voice call decides that the interaction should be handled by another Knowledge Worker in the enterprise. The call is routed through the Genesys environment, and the targeted Knowledge Worker is sent an Interaction Preview asking if they can accept the customer call.

A common call flow for this scenario is as follows:

1. A Knowledge Worker is engaged in a voice call with a customer.

2. The Knowledge Worker initiates a transfer or conference to another Knowledge Worker in the enterprise by selecting a contact point in the `Interaction` window. This contact point is mapped to a `Routing Point` DN in the Genesys environment.

3. Once the call arrives on the `Routing Point` DN, the routing strategy loaded on the DN begins the process of selecting an available Knowledge Worker.

4. Presence monitoring determines which Knowledge Workers are currently available, and this information is made available to the routing strategy.

5. Using this presence information, the routing strategy selects an available Knowledge Worker.

6. Universal Routing Server (URS) sends a Preview Interaction to the selected Knowledge Worker—a screen pop arrives at the Knowledge Worker's desktop or device, asking if they will accept the interaction.

   • If the Preview is accepted, the customer call is then transferred to the new Knowledge Worker.

   • If the Preview is declined, URS can apply default routing, or select another available Knowledge Worker for Preview, depending on the strategy.

7. If the Preview is accepted, the customer call is then transferred to the new Knowledge Worker. If the Preview is declined, URS can apply default routing, or select another available Knowledge Worker for Preview, depending on the strategy.