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GENESYS

Account Codes in CIC

Technical Reference

Abstract

This technical reference describes how to use account codes in Customer Interaction Center. It includes how to create account codes in Interaction Administrator and how to assign account codes to incoming and outgoing calls in the CIC clients.

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For copyright and trademark information, see https://help.genesys.com/pureconnect/desktop/copyright_and_trademark_information.htm.

Table of Contents

About account codes

CIC uses numeric account codes to track incoming and outgoing calls to generate account code reports. Users who have access to an account code can assign it to a call so CIC can track it. For example, CIC can use account codes to track outgoing calls made to specific customers, or to track incoming call information for billing purposes.

When a user attaches an account code to a call, CIC captures information about that call when the call disconnects. This information appears in the account code report.

- <u>Account codes in Interaction Administrator</u>
- <u>Understanding account codes in the CIC clients</u>
- Placing calls with account codes

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Account codes in Interaction Administrator

To set up account codes, use Interaction Administrator to complete these tasks:

- 1. <u>Enable account codes</u> to turn on account codes at the system level.
- 2. <u>Create account codes</u> and then associate the code with a description.
- 3. Give account code access to a default user, a specific user, members of a role, or members of a workgroup.
- 4. Activate account code verification on Dial Plan objects.

Enabling account codes in CIC

Selecting Enable Account Codes in Interaction Administrator displays the Account Code field and Account Name column on the Interactions page of the CIC client.

To enable the account code feature, from Interaction Administrator:

- 1. Select Account Codes Configuration in the People container.
- 2. Select Enable Account Codes.

Solution Default User	Accourt	nt Codes Configura	ation
 Roles Users Workgroups Password Policies 	Enable Accou	nt Codes	
Schedules	Custom attributes		
🕀 😵 Wrap-up	-	7	
Client Buttons	Name	Value	4
🗉 💔 Client Configuration			×
Queue Columns			<u></u>
😑 🔡 Account Codes Configuration			
團 Account Codes			
Client Templates			
🗉 🔊 Response Management 🛛 🔳	History		

3. Click OK.

Creating account codes

To create an account code:

- 1. Click Account Codes inside the Account Codes Configuration container.
- 2. In the right pane, click +.



3. In the Code text box, type a unique set of numbers, up to a maximum of 50 digits, to use as an account code.

001			0
Description: This	is a sample account code.		^
Custom attributes			~ #
Name	Value	*	
History Auto-save			Save Save Revert

Note: Because CIC treats account codes as strings, not numbers, by the database program, account codes with leading zeros appear first in reports. For example, account numbers 1, 3, 20, 213, 0214, 1234, and 001235 are sorted as 001235, 0214, 1, 1234, 20, 213, and 3.

- 4. In the **Description** text box, type a description for the account code. This description appears next to the account code in the list view window in Interaction Administrator.
- 5. Click Save.

Your next task is to give users access to account codes.

Giving users access to account codes

Giving rights and access to account codes allows users to assign account codes to incoming and outgoing calls.

There are four ways to give account code access to users. You can:

- Set up the Default User to give all users access to account codes
- Give access to a specific user
- Give access to members of a role
- Give access to members of a workgroup

Users can inherit account code rights from any of these configurations. Here's how to give rights and access for each of the four configurations:

Note: Requiring account code verification for users is applied on the User Rights tab. Giving users access to account codes is applied on the Access Control tab. It is possible to give a user access to account codes without requiring account code verification. A user with access to account codes can assign an account code to a call.

Default User access

Giving rights and access to account codes at the Default User level allows all users to assign account codes to calls.

To give account code rights and access at the Default User level, follow these steps:

- In the People container, click Default User, and double-click Configuration. The Default User Configuration dialog box appears.
- 2. Click the **Security** tab then click **Security Rights**.
 - The $\ensuremath{\textbf{Security Rights}}$ dialog box appears.

		Sec	urity Rights	
Category:	<all></all>		Search:	Clear
Show on	ly selected items and grou	ips		
Name		Has Right	Inherited From	~
Client R	ights			
Account C	ode Verification	¥		=
Conference Customize Manage C Mini Mode Monitor Co Multiple Co Orbit Que	: Client lient Templates olumns alls ue : Connections tules		- 10	
	f Access Details			Close

- 3. Select Account Code Verification and click Close.
- 4. Click Access Control.

The Access Control dialog box appears.

Category:	People		~	Search:		Cle	ar
Show or	nly selected items an	d groups		100			
Name		View	Substitute	Statistics	Inherited From		~
Accour	nt Codes						_
*[Al]		~					=
001							
Client 8	Buttons						
*[Al]		~					
Directo	ry Status Columns						
"[AI]		×					
Activated	10						
Forward I	Number						
Logged In	1						
Notes							
On Phone							¥
<			111			>	
Arhusona	d Access Details						

5. In the Category list, click People.

- 6. Under Account Codes, select one or more account codes to give users access to specific account codes; or, select * [A11] to give users access to all available account codes.
- 7. Click Close.

All users now have access to the selected account codes.

Individual user access

To give individual users rights and access to an account code, follow these steps:

- 1. In the **People** container, click **Users**.
- 2. In the right pane, double-click the user's name. The **User Configuration** dialog box appears.
- 3. Click the Security tab then click Security Rights.
- The Security Rights dialog box appears.

		See	curity Rights	
Category:	<al></al>		✓ Search:	Clear
Show on	ly selected items and group	os		
Name		Has Right	Inherited From	^
Client R	ights			
Account C	ode Verification	 Image: A set of the set of the		=
Mini Mode Monitor Co Multiple Co Orbit Que	: Client lient Templates olumns alls ue : Connections tules		Default User Default User	*
Advanced	f Access Details		ш	Close

4. Select Account Code Verification and click Close.

Note: The **Has Right** check box appears for Users, Roles, and Workgroups. This box has a gray check mark if the user has inherited account code rights from another configuration, such as Default User, Roles, or Workgroups.

5. Click Access Control.

The Access Control dialog box appears.

ategory:	People		~	Search:		Cle	ar
Show or	nly selected items and grou	ips					
Name		View	Substitute	Statistics	Inherited From		~
Accoun	t Codes					-	=
*[Al]		~					=
001							Γ
Client B	uttons						
*[Al]		4			Default User		
Director	ry Status Columns						
"[AI]		4			Agent, Default User		
Activated							
Forward N	Number						
Logged In	1						
Notes							
On Phone							*
<			- 11			>	

- 6. In the **Category** list, click **People**.
- 7. Under Account Codes, select one or more account codes to give the user access to specific account codes. Alternatively, select * [All] to give the user access to all available account codes.
- 8. Click Close.

Role member access

To role members rights and access to account codes, follow these steps:

- In the People container, click Roles, and then double-click a role name. The Role Configuration dialog box appears.
- 2. Click the Security tab then click Security Rights.
 - The Security Rights dialog box appears.

	Se	curity Rights	
Category: <all></all>		✓ Search:	Clear
Show only selected items and groups			
Name	Has Right	Inherited From	^
Client Rights			
Account Code Verification	~		=
Can Create Speed Dials Conference Calls Customize Client Manage Client Templates Mini Mode Monitor Columns Multiple Calls Orbit Queue Persistent Connections Personal Rules		Default User Default User	
Advanced Access Details		ш	Close

3. Select Account Code Verification and click Close.

Note: The **Has Right** check box appears for Users, Roles, and Workgroups. This box has a gray check mark if the user has inherited account code rights from another configuration, such as Default User, Roles, or Workgroups.

4. Click Access Control.

The Access Control dialog box appears.

		A	Access C	ontrol			
Category:	People		v	Search:		Cle	ar
Show or	nly selected items and gro	ups					
Name		View S	ubstitute	Statistics	Inherited From		^
Account	nt Codes						=
*[Al]							[=
001							Г
Client B	Buttons						
*[Al]		9			Default User		
Directo	ry Status Columns						
"[All]		*			Agent, Default User		
Activated	10						
Forward N	Number						
Logged In	1						
Notes							
On Phone	1						Y
<			111			>	

- 5. In the Category list, click People.
- 6. Under **Account Codes**, select one or more account codes to give members of the role access to specific account codes. Alternatively, select *****[**A11**] to give members of the role access to all available account codes.
- 7. Click Close.

Members of the role now have access to account codes.

Workgroup member access

To give members of a workgroup rights and access to account codes, follow these steps:

- In the People container, click Workgroups, and then double-click a workgroup name. The Workgroup Configuration dialog box appears.
- Click the Security tab then click Security Rights. The Security Rights dialog box appears.

ategory:	<al></al>		✓ Search:	Clear
Show on	ly selected items and groups			
Name		Has Right	Inherited From	^
Client Ri	ights			
Account Co	ode Verification	~		=
Mini Mode Monitor Co Multiple Ca Orbit Queu Persistent Personal R Droblom Dr	Client lient Templates slumns slis ue Connections cules		Default User Default User	~
<				>

3. Select Account Code Verification and click Close.

Note: The **Has Right** check box appears for Users, Roles, and Workgroups. This box has a gray check mark if the user has inherited account code rights from another configuration, such as Default User, Roles, or Workgroups.

4. Click Access Control.

The Access Control dialog box appears.

			Access (Control			
ategory:	People		~	Search:		0	ear
Show or	nly selected items and gro	ups					
Name		View	Substitute	Statistics	Inherited From		1
Accour	nt Codes						
*[All]							ľ
001							T
Client 8	Buttons						
*[Al]		9			Default User		
Directo	ry Status Columns						
"[A]]	The strategy of the state of th	¥			Agent, Default User		
Activated	1						
Forward 1	Number						
Logged In	1						
Notes							
On Phone	•						
<			- HE			>	

- 5. In the Category list, click People.
- 6. Under **Account Codes**, select one or more account codes to give members of the workgroup access to specific account codes. Alternatively, select *****[**All**] to give members of the workgroup access to all available account codes.
- 7. Click Close.

Members of the workgroup now have access to account codes.

Your next task is to apply Account Code Verification for a Dial Plan object.

Applying Account Code Verification in Dial Plan

When the Dial Plan object has Account Code Verification, outbound calls made on that number require the user to assign a valid account code. Currently, no outbound calls for that Dial Plan object can be placed without assigning a valid account code to the call.

When the call disconnects, CIC saves the information tracked by the account code. An Account Code report includes this call information.

To apply Account Code Verification to Dial Plan objects, follow these steps:

1. In the **System Configuration** container, click **Phone Numbers**, and double-click **Configuration**. The Phone Number Configuration dialog box appears.

Regional Dial Plan	DID/DNIS	Private Lines	Custom Attribute	History		
	edit, modify i	by import, or e	port the dial plan		Dial Plan	
Number Lists Manage t	he number i	sts used by the	dial plan.		Manage Lists.	
	he dial plan	dassifications.			Manage Classificat	ions
	dial plan by s	imulating called	i numbers.		Simulate Call.	
					Advanced	
				ОК	Cancel	Apply

- 2. Click the Regional Dial Plan tab.
- 3. Click **Dial Plan...** The Regional Dial Plan dialog box appears.

	Input Pattern	List Name	Filter	Standardized	Classification	Description	1
1	spicZ		(AI)	507	SP	SIP address (explicit)	
2	sips:Z		<ae></ae>	sips:Z	SIP	SIP secure	
3	tel:Z		<al>></al>	tel:Z	TEL		
4	7@Z		<al></al>	sip:?@Z	SIP	SIP address (@-based)	3
5	0		<al></al>	0	Intercom	Company operator	
5	00		<al></al>	00	Local Operator	Local Operator	
7	911		<al></al>	911	Emergency		
8	411		<ai></ai>	411	Information		
9	1411		<a5></a5>	411	Information		
10	5551212		<al></al>	411	Information		
11	Nxx5551212		<al></al>	411	Information		
12	1Nox5551212		<al></al>	411	Information		
13	+1Nox5551212		<al></al>	411	Information		
14	N00000000002		<al></al>	+10000000002	International	11 (or more) digit International	
15	\$\$\$%bo0000Z	Tol Free	<al></al>	+1\$\$\$Noc0000Z	Toll Free		
16	1\$\$\$%bo0000Z	Tol Free	<al></al>	+1\$\$\$Nxx000XZ	Toll Free		
17	+1\$\$\$%000002	Tol Free	<al></al>	+1\$\$\$N00000Z	Toll Free		-
18	\$\$\$000007	Rincked Numbers	<48>	+1555000007	Rincked		2

4. Select the Dial Plan object that you want to assign account code verification and click **Edit**. The **Regional Dial Plan - Edit Pattern** dialog box appears.

nput Pattern:	202	>	Standardize	d Number:	sip:Z	3
ocation Filter	<al></al>	v	Default Dial	String:	sip:Z	(
ist Name:	[*	Display Strin	ig:	sip:Z	(
Dassification:	SIP	~	Edit Base:		sip:Z	5
	Account Code	Verification	Components	RE .		~ .
Description:	SIP address (exp	kat)				v
Dial Group	Filter	Classificat	ion	Dial String		Add Group
						Edit
						Remove
						Up Down

- 5. Select Account Code Verification, and then click OK.
- 6. Repeat steps 4 and 5 for each Dial Plan object that requires an account code.

Note: Do not assign Account Code Verification to numbers such as 911 and intercom calls. You would not want to require a user to assign an account code to these types of numbers. For example, if an account code was required for 911 and the user did not have access to account codes, the call would not go through.

Understanding account codes in the CIC clients

In the CIC client, users can use account codes to organize interactions by customer. Your company can use this feature for customer billing purposes, or if users process interactions through Customer Interaction Center for more than one company. Your system administrator can generate reports to categorize call details by account codes.

You can assign account codes to incoming and outgoing interactions or from any Interaction Object (such as calls, email messages, chat sessions, or callback objects).

- <u>Account Code Restrictions</u>
- Account Code Requirements
- Assign Codes to a Callback Request
- Assign Codes to a Chat
- <u>Assign Codes to an Email Message</u>
- <u>Assign Codes to an Incoming Interaction</u>
- <u>Assign Codes to an Outgoing Interaction</u>

Note: For detailed information on applying account codes to incoming and outgoing interactions or from any Interaction Object, see the help for your version of the CIC client.

Account Code Restrictions

When working with account codes, it is important to note the following restrictions:

- You cannot split an interaction between account codes.
- You can assign only one account code per interaction.
- You cannot assign, change, or delete an account code after it disappears from your queue unless you have permission to modify the queue to which the interaction transfers.
- You can sort account codes numerically. When you type the first few numbers of the account code, the CIC client jumps ahead to the first match, speeding the process of selecting the appropriate code.
- You can use the **Properties** dialog box to set an account code for any incoming or outgoing interaction.
- You are prompted to assign account codes to outgoing interactions in the **Advanced Dialing Options** dialog box only if your company uses account codes and your system is appropriately configured. See "Advanced Dialing Options" in the help for your version of the CIC client.

Account Code Requirements

Account Code fields do not appear if you do not have the View Account Codes Access Control right. You cannot assign an Account Code to an interaction if you do not have the Account Code Verification Security Right.

Assign Codes to a Callback Request

You can assign an Account Code to a callback request. If these codes are defined in Interaction Administrator, the Account Code drop-down list appears in your Callback Request window.

To assign a code to a callback request:

You can assign an Account Code after you respond to a callback request by selecting the appropriate code in the Callback window.

0	Sally -	- Callback	< = • ×
File Edit View Ad Pickup Hold Transfe From: Sally (555-			Account Code [001] This is a sample accour
Number: 555-555-5	555	Make Call	Notes
Attempt: 1 (Maxi	mum Attempts: 2)		11
			•
			Responses
	Caliback Complete	Retry Later Attempt Faile	đ
2001681005 0:02:20	Connected		

Assign Codes to a Chat

If you have the appropriate rights, you can assign an Account Code to a chat session. The Account Code list contains the codes defined in Interaction Administrator.

To assign codes to a chat:

You can assign an Account Code during a chat session by selecting the appropriate code in the Chat Window.

8	Sally -	- Chat	t L	- • ×
🥥 🛛 🤤	Actions Help			
Pickup Hold Trans Sally DamianG	fer Disconnect Assistance		Account Code [001] This is a sar	mple acc 🔻
 Welcome to IC! Interaction transfe Interaction alertin Sally has joined th 	g DamianG.	5	Notes	
2001681008 0:01:03	📮 ACD - Assigned: Damian	Send 0	Responses	-

Assign Codes to an Email Message

You can assign an Account Code to an email interaction. The Account Code list appears in your email window if these codes are defined in Interaction Administrator.

To assign a code to an email message:

You can assign an Account Code to an email message by selecting the appropriate code in the email window.

Assign Codes to an Incoming Interaction

To assign an account code to an incoming interaction:

- 1. Select the incoming interaction and click **Pickup**, or pick up your telephone handset.
- 2. Right-click the interaction and click **Properties**. The **Interaction Properties** dialog box appears.
- 3. In the Interaction Properties dialog box, in the Account Code list, click the account code to assign to this interaction.
- Click the X in the upper right corner of the Interaction Properties dialog box to close it.
 The account code you assigned to the interaction appears in the Account Code column of your queue.

Assign Codes to an Outgoing Interaction

If your company uses account codes and/or wants to track calls by workgroup, then you can be prompted to assign an account code or select an ACD workgroup name every time you make a call. Your system must be appropriately configured in order for this to occur. See "Advanced Dialing Options" in the help for your version of the CIC client.

To assign an account code to an outgoing interaction:

1. In the Number box, type the phone number to call.

🌅 New 👻 🖟 👘 🗙 👘 🧔 Available, Forward 🔹 📑 🐨 🛛 Workgroups 👻 🛛 5555214	× -

2. Click Make Call or press Enter.

The Advanced Dialing Options dialog box appears.

🐨 A	dvanced Dialing	Options 🛛 🕱	J
	Number:	2222222	
	Account Code:	🐻 [001] ABC Bank 🗸	
	Workgroup:	Sa Marketing 👻	
		OK Cancel	

3. Click the arrows at the end of the **Account Code** list, click the code to assign to this interaction and click **OK**. **Result:** The call is started.

Note: If your CIC administrator has configured and enabled account codes, you must assign a code. A workgroup code signifies that the call was made on behalf of a workgroup. You can select <None> for calls not made for a workgroup. See "Advanced Dialing Options" in the help for your version of the CIC client for more details on how to use the **Advanced Dialing Options** dialog box.

You can use the **Properties** window to set an account code for any incoming or outgoing interaction. A workgroup code can only be assigned when you start the interaction, not after it has started.

To assign an account code to an outgoing interaction using the Interaction Properties dialog box:

- 1. During an outgoing interaction, right-click the interaction and click **Properties**.
- The Interaction Properties dialog box appears.
- 2. In the Interaction Properties dialog box, in the Account Code list, click the account code to assign to this interaction.
- 3. Click the X in the upper right corner of the Interaction Properties dialog box to close it. The account code you assigned to the interaction appears in the Account Code column of your queue.

Placing calls with account codes

This matrix shows how calls are handled when using account codes on outgoing calls. The following describes the column headers:

- User has Account Code Verification
- The Account Code Verification box is selected in the Security Rights dialog box in Interaction Administrator.
- User specified an account code for the call
- The user has entered either a valid or invalid account code for the outbound call.
- Dial Plan Object has Account Code Verification
 The Account Code Verification box is selected in Dial Plan for the number being dialed.
- Outcome of the call
 Describes if the call was placed, or if the call did not go through.
- Call information

When the call ended, call information was logged and appears in the Account Code Report, or call information was not logged and does not appear in the report.

User has Account Code Verification	User specified an account code fo the call	rDial Plan object has Account Code Verification	Outcome of the call	Call information
No	Yes, valid	No	Places call	Logged
No	Yes, valid	Yes	Places call	Logged
No	Yes, invalid	No	Call not placed	Not logged
No	Yes, invalid	Yes	Call not placed	Not logged
No	No	No	Places call	Not logged
No	No	Yes	Call not placed	Not logged
Yes	Yes, valid	No	Places call	Logged
Yes	Yes, valid	Yes	Places call	Logged
Yes	Yes, invalid	No	Call not placed	Not logged
Yes	Yes, invalid	Yes	Call not placed	Not logged
Yes	No	Yes	Call not placed	Not logged
Yes	No	No	Places call	Not logged

Change Log

The following changes have been made to "Account Codes in IC", since Customer Interaction Center version 4.0 product availability.

Change Log Date	Changed
01-August-2014	Updated documentation to reflect changes required in the transition from version 4.0 SU# to CIC 2015 R1, such as updates to product version numbers, system requirements, installation procedures, references to Product Information site URLs, and copyright and trademark information.
01-July-2015	Updated cover page with new logo.
01-September-2015	Updated documentation to reflect the addition of two CIC client applications, Interaction Desktop and Interaction Connect, and the removal of Interaction Client .NET edition.
01-December-2015	Updated process for configuring account codes in Interaction Administrator with new screenshots and instructions to reflect current interface.
01-April-2017	Updated documentation to reflect the removal of Interaction Client Web Edition and Interaction Client Mobile Web Edition.
07-February-2018	Converted to HTML format.
07-May-2019	Reorganized content, adding links where needed. For more details, see <u>CICDOC-177</u> .