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See Change Log for summary of changes.

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.

For the latest version of this document, see the PureConnect Documentation Library at: http://help.genesys.com/pureconnect.

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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.

- Account codes in Interaction Administrator
- Understanding account codes in the CIC clients
- Placing calls with account codes

Account codes in Interaction Administrator

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

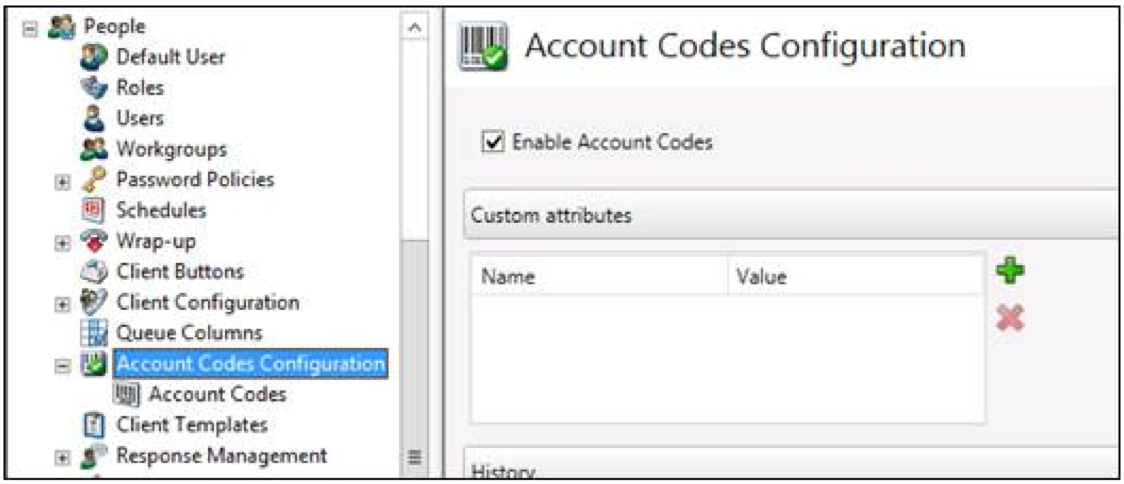
1. Enable account codes to turn on account codes at the system level.
2. Create account codes and then associate the code with a description.
3. Give account code access to a default user, a specific user, members of a role, or members of a workgroup.
4. Activate account code verification on Dial Plan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



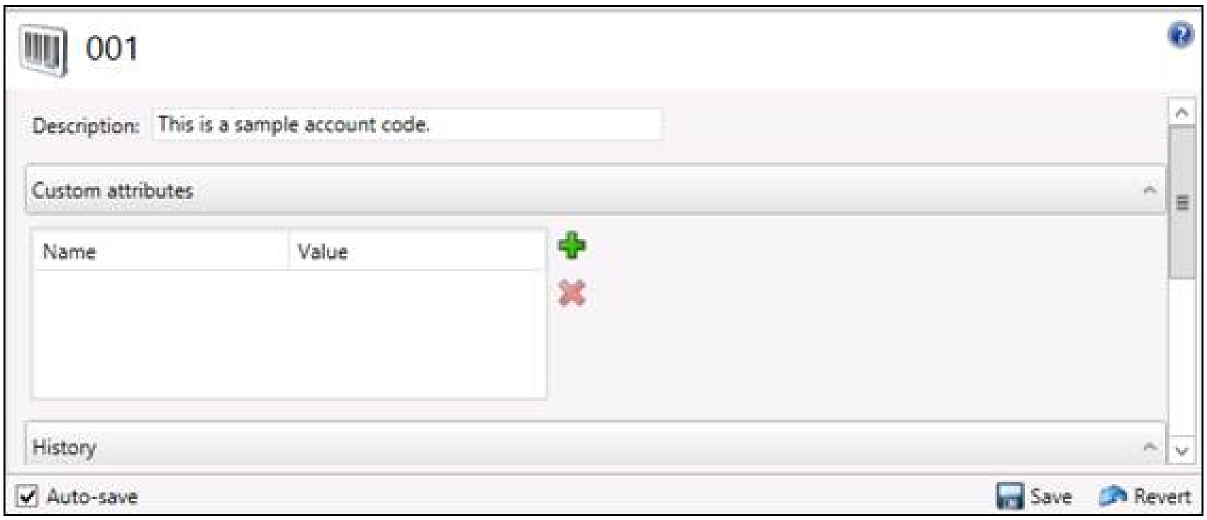
3. Click **OK**.

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.



> **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:

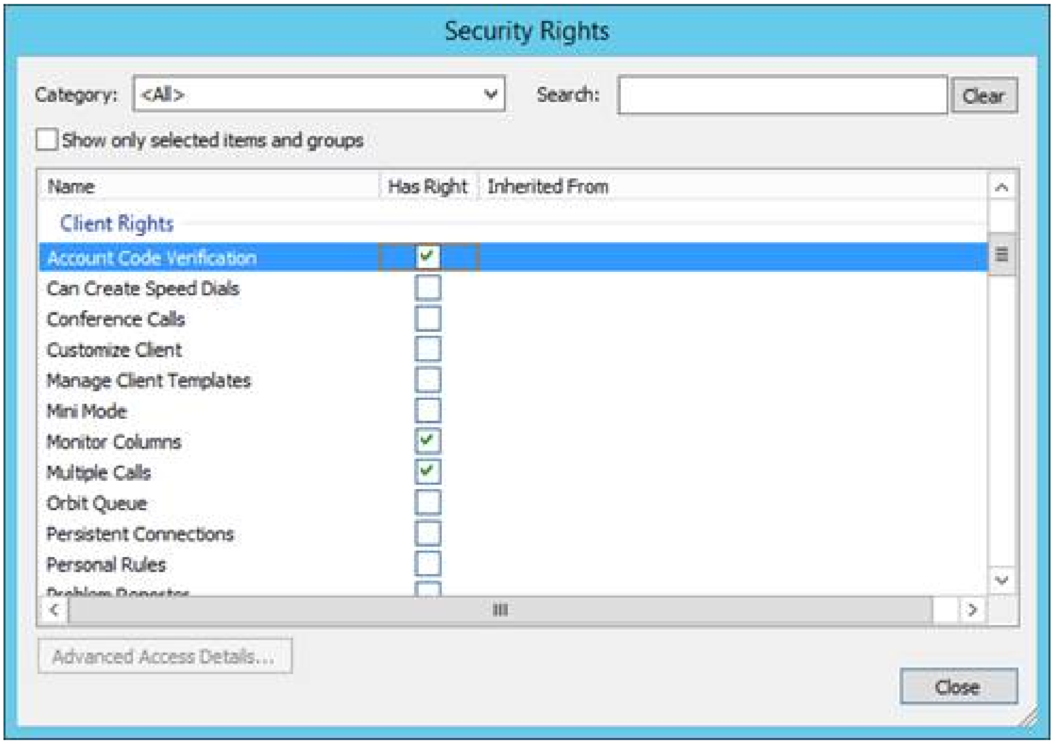
> **Note:** Requiring account code verification for users is applied on the User Rights tab. Giving users access to account codes is applied on the Access Control tab. It is possible to give a user access to account codes without requiring account code verification. A user with access to account codes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

Default User access

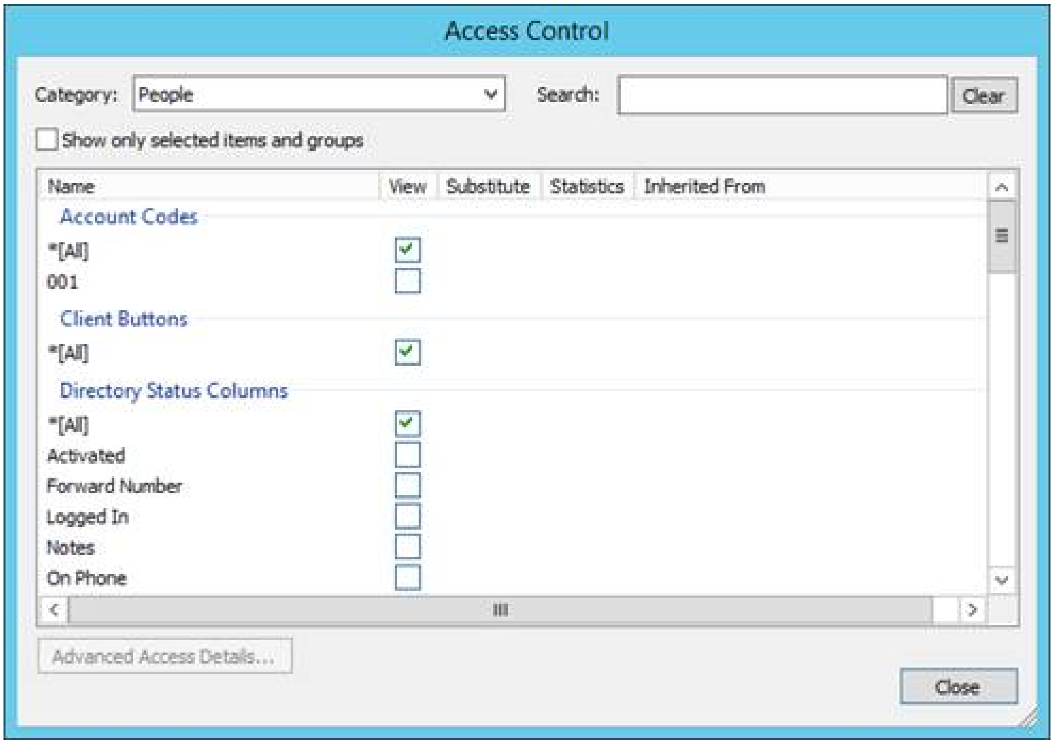
Giving rights and access to account codes at the Default User level allows all users to assign account codes to calls.

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

1. 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 **Security Rights** dialog box appears.



3. Select **Account Code Verification** and click **Close**.
4. Click **Access Control**.
   The **Access Control** dialog box appears.



5. In the **Category** list, click **People**.

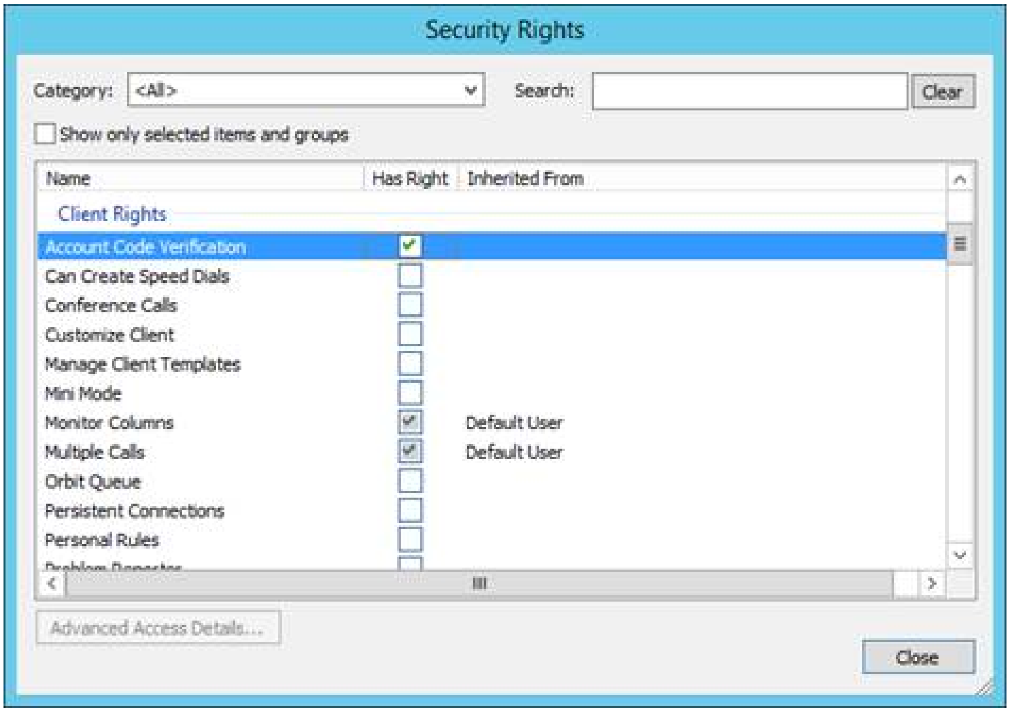
6. Under **Account Codes**, select one or more account codes to give users access to specific account codes; or, select `*[All]` to give users access to all available account codes.
7. Click **Close**.

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:

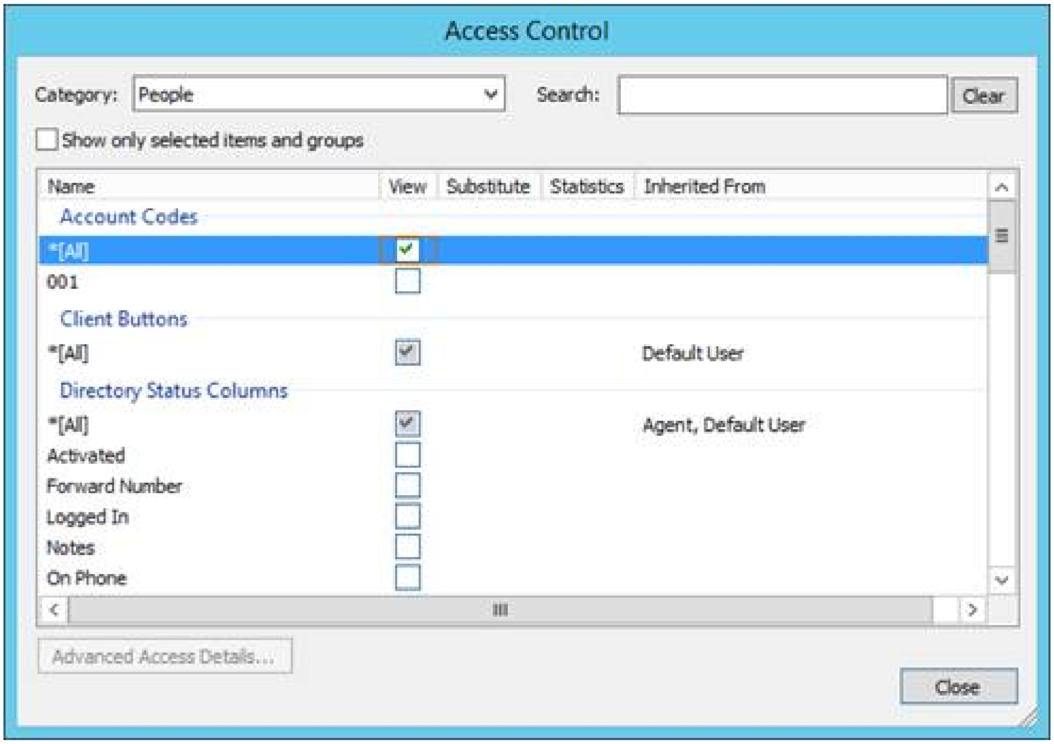
1. In the **People** container, click **Users**.
2. In the right pane, double-click the user's name. The **User Configuration** dialog box appears.
3. Click the **Security** tab then click **Security Rights**.
   The Security Rights dialog box appears.



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.

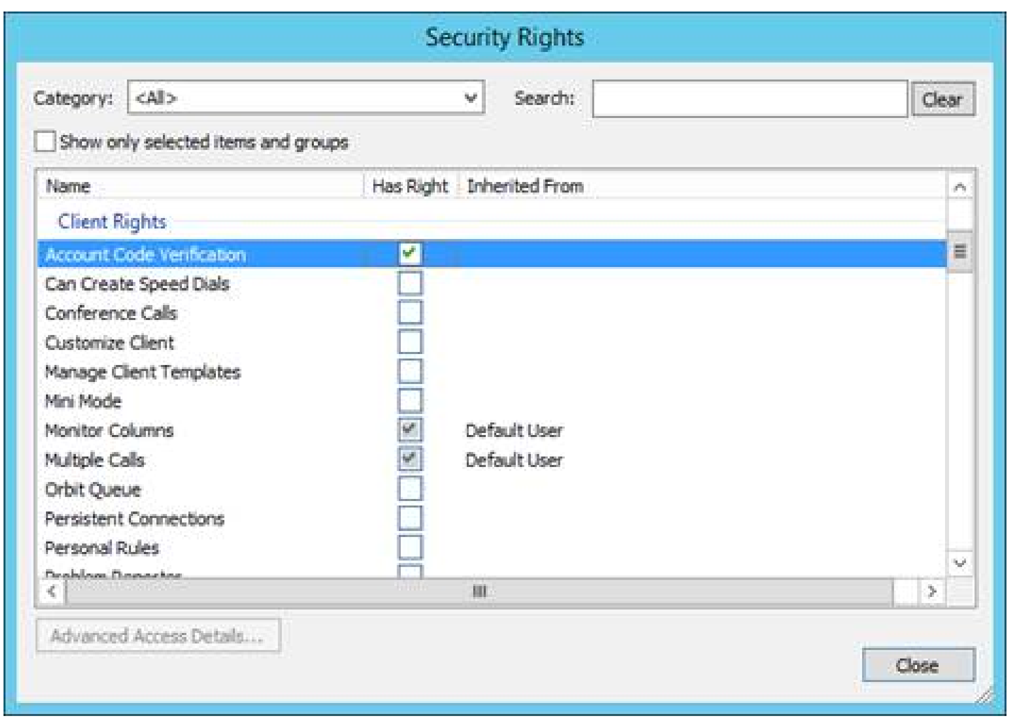


6. In the **Category** list, click **People**.
7. Under **Account Codes**, select one or more account codes to give the user access to specific account codes. Alternatively, select `*[All]` to give the user access to all available account codes.
8. Click **Close**.

Role member access

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

1. 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.

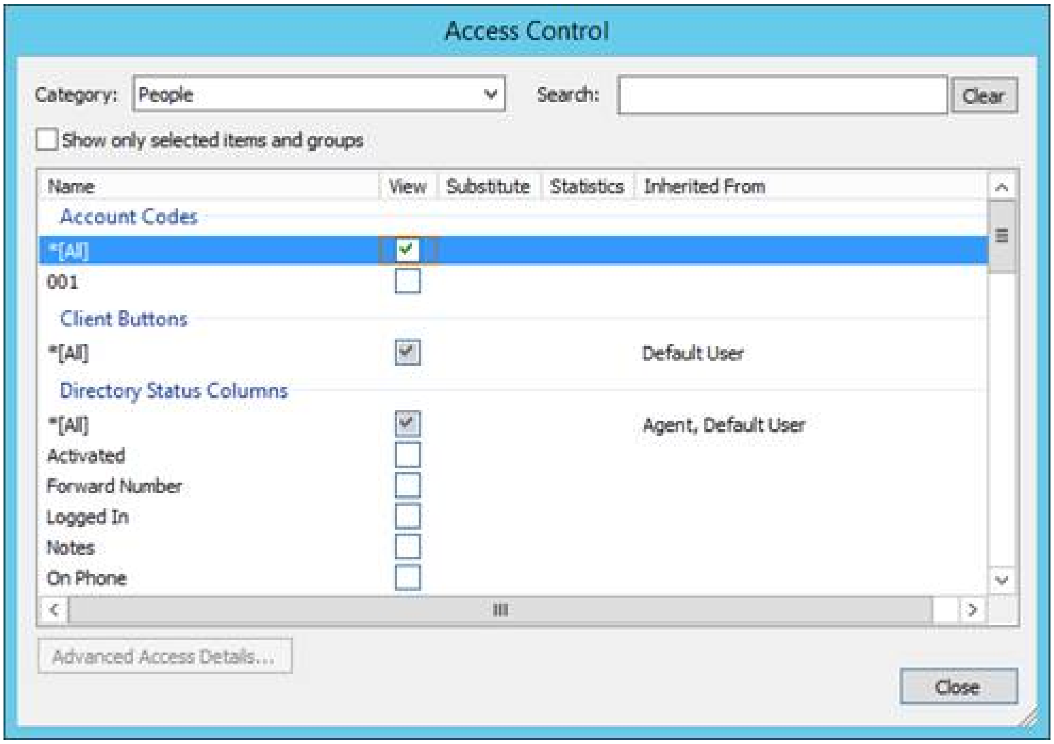


3. Select **Account Code Verification** and click **Close**.

   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.



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 `*[All]` 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

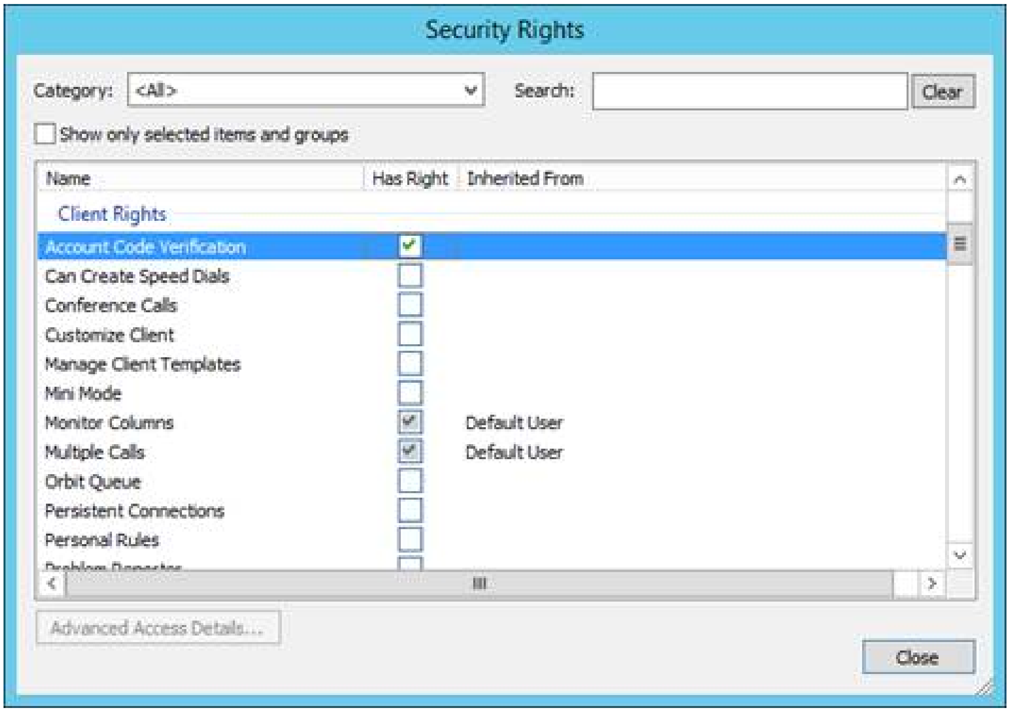
To give members of a workgroup rights and access to account codes, follow these steps:

1. In the **People** container, click **Workgroups**, and then double-click a workgroup name.

   The **Workgroup Configuration** dialog box appears.

2. Click the **Security** tab then click **Security Rights**.

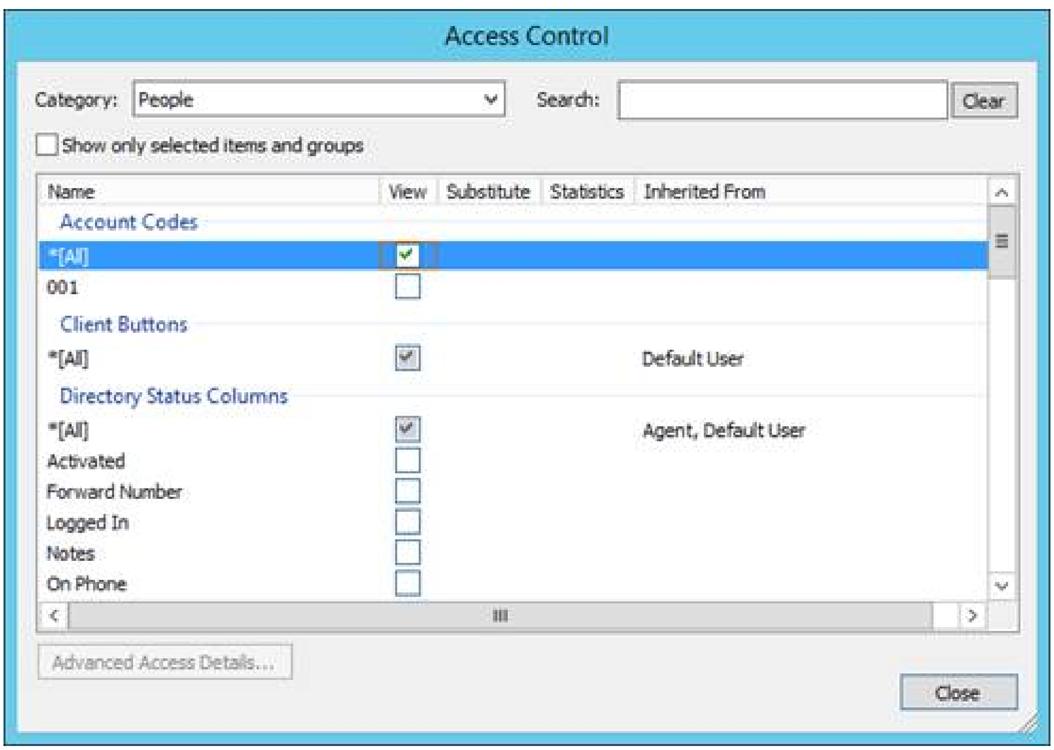
   The **Security Rights** dialog box appears.



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.



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.

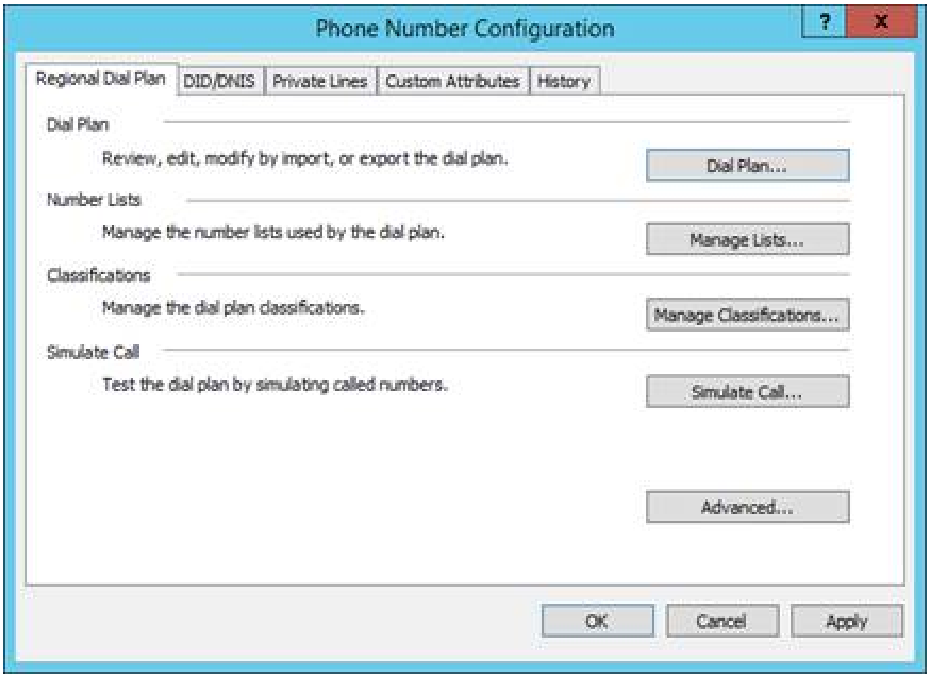
Applying Account Code Verification in Dial Plan

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.

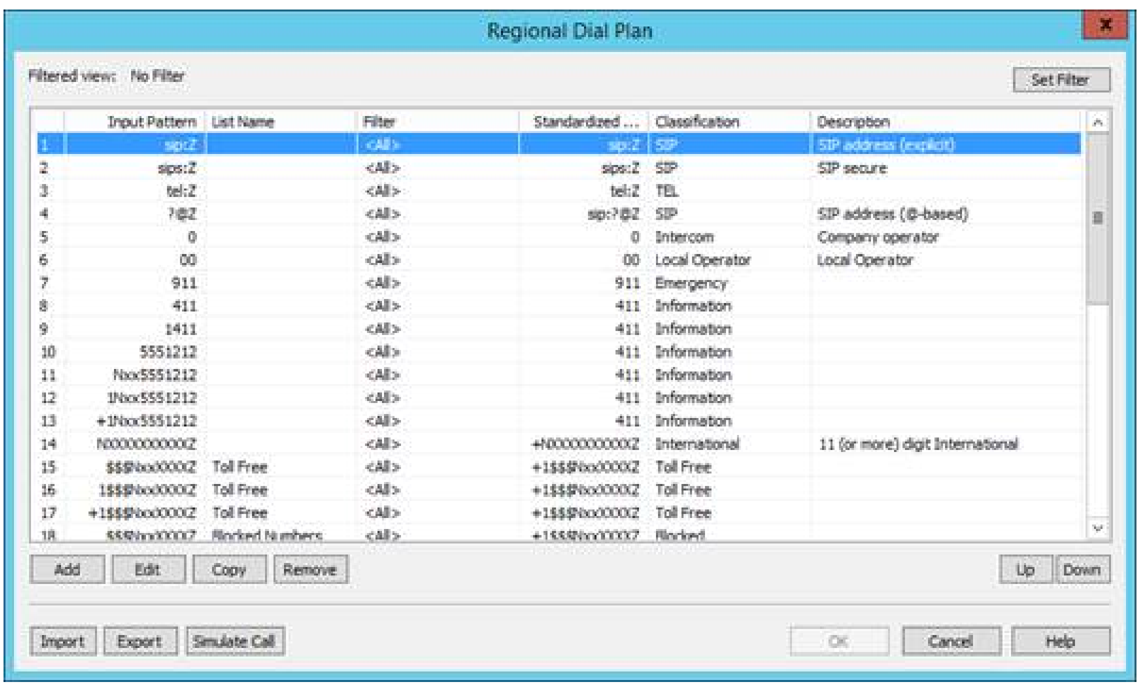
When the call disconnects, CIC saves the information tracked by the account code. An Account Code report includes this call information.

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

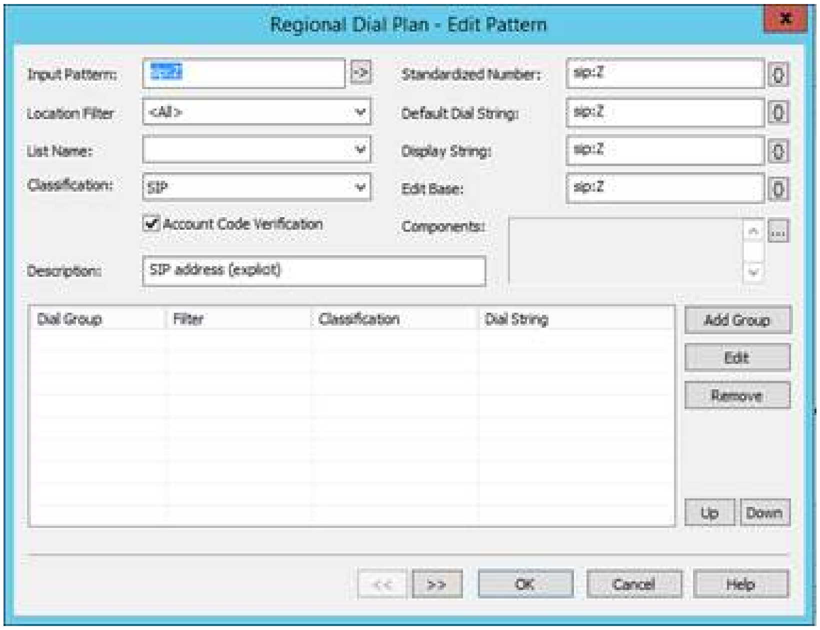
1. In the **System Configuration** container, click **Phone Numbers**, and double-click **Configuration**. The Phone Number Configuration dialog box appears.



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



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.



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).

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

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

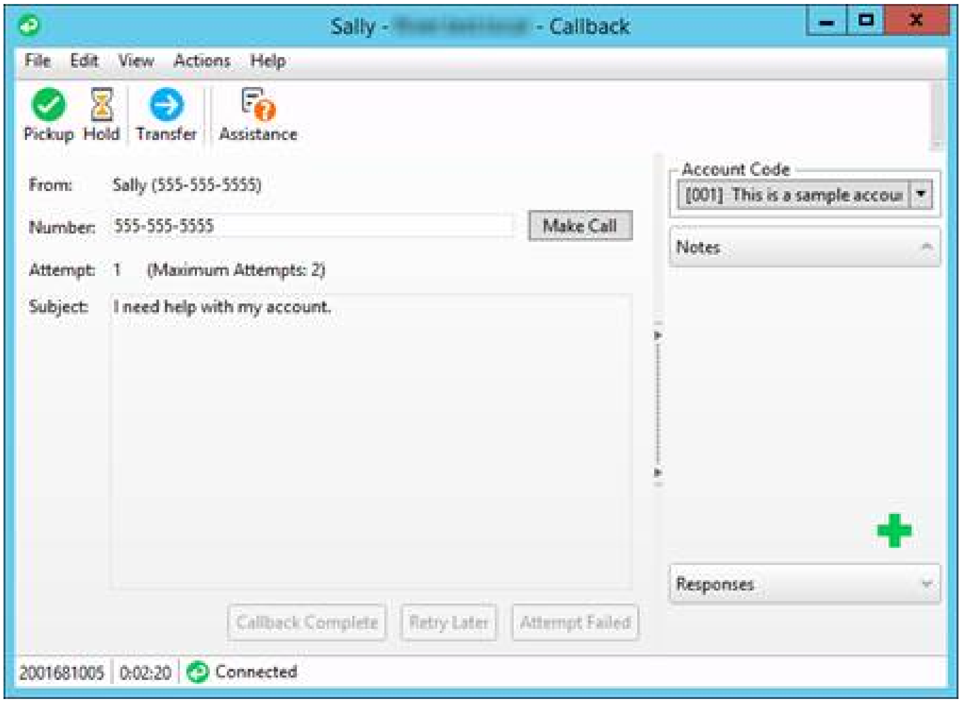
Account Code fields do not appear if you do not have the View Account Codes Access Control right. You cannot assign an Account Code to an interaction if you do not have the Account Code Verification Security Right.

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.

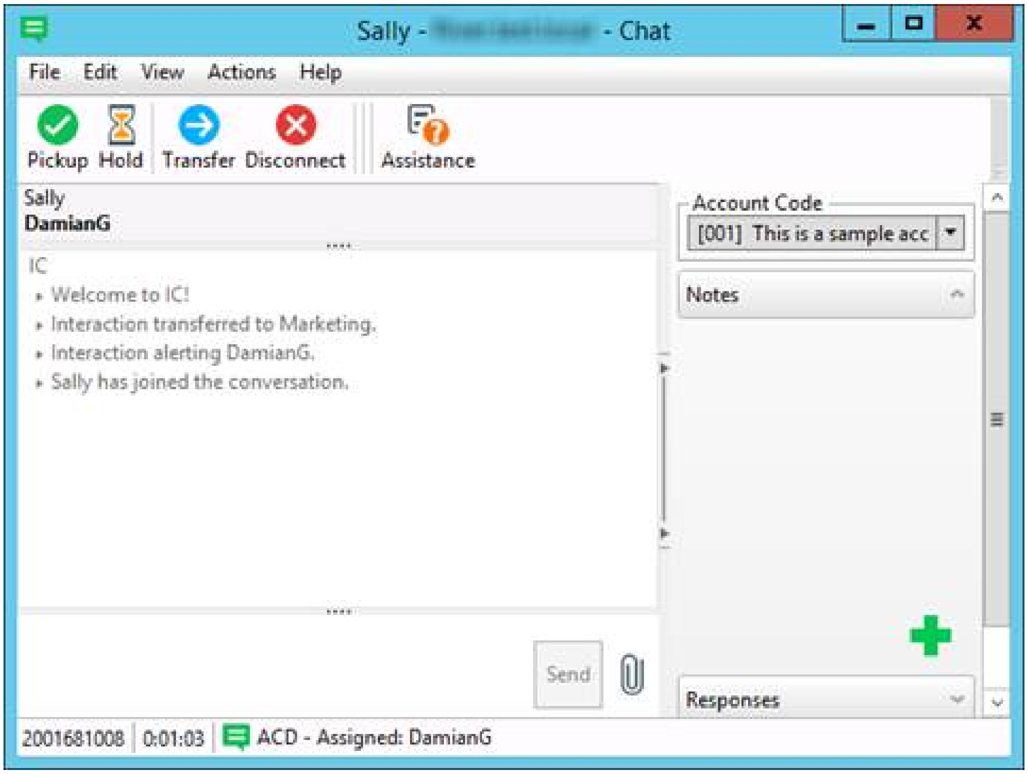


Assign Codes to a Chat

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.



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:

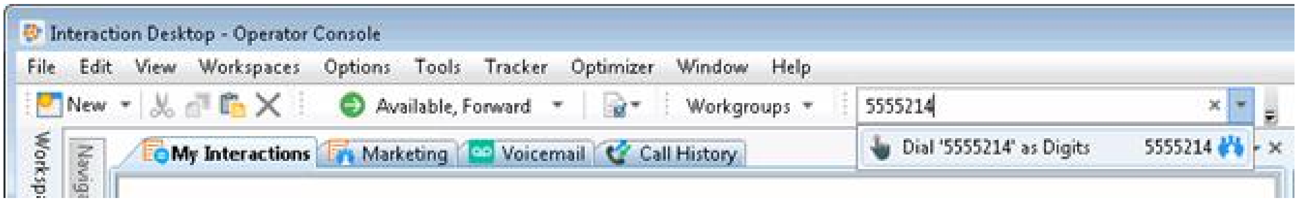
1. Select the incoming interaction and click **Pickup**, or pick up your telephone handset.
2. Right-click the interaction and click **Properties**.
   The **Interaction Properties** dialog box appears.
3. In the **Interaction Properties** dialog box, in the **Account Code** list, click the account code to assign to this interaction.
4. 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

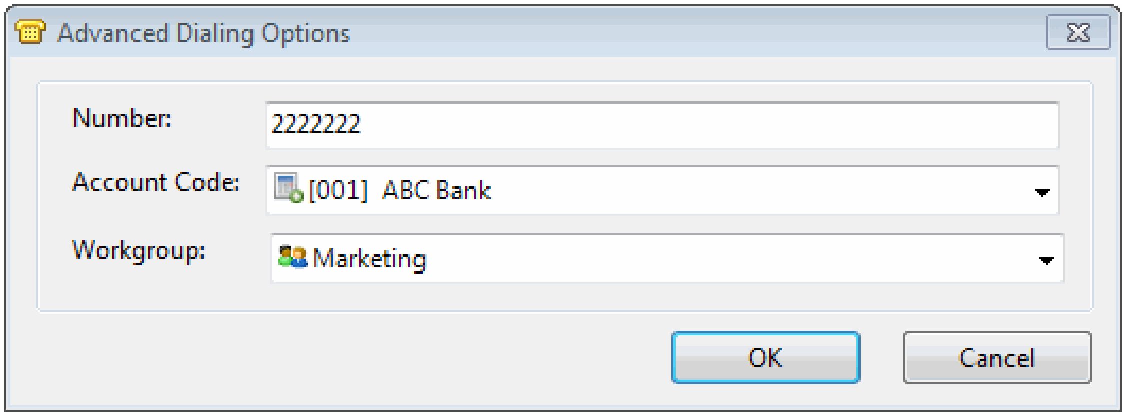
If your company uses account codes and/or wants to track calls by workgroup, then you can be prompted to assign an account code or select an ACD workgroup name every time you make a call. Your system must be appropriately configured in order for this to occur. See "Advanced Dialing Options" in the help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



2. Click **Make Call** or press **Enter**.
   The **Advanced Dialing Options** dialog box appears.



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 for the call	Dial 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 CICDOC-177.