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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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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>
- Understanding account codes in the CIC clients
- 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.

| B People Peopleople People People People People People | Accour | nt Codes Configura | ation |
|--|-------------------|--------------------|-------|
| Users Workgroups Password Policies | Enable Accou | int Codes | |
| Schedules | Custom attributes | | |
| Wrap-up Gient Buttons | Name | Value | 4 |
| Olient Configuration Queue Columns | | | × |
| Account Codes Configuration Account Codes | | | |
| Client Templates | 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 Security Rights dialog box appears.

| | | Secu | irity Rights | |
|--|---|-----------|----------------|-------|
| Category: | <al></al> | , | Search: | Clear |
| Show or | nly selected items and g | roups | | |
| Name | | Has Right | inherited From | 2 |
| Client R | lights | | | |
| Account C | ode Verification | ~ | | |
| Conference Customize Manage C Mini Mode Monitor Cr Multiple Cr Orbit Que Persistent Personal F Dechloro D | e Client lient Templates olumns alls ue : Connections Rules | | | |
| < | d Access Details | | 111 | > |
| MUVBLICE | APPEND DERIGHT | | | Close |

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

The Access Control dialog box appears.

| Category: | People | ✓ Search: | Clear |
|-----------|-----------------------|---|-------|
| Show or | nly selected items an | l groups | |
| Name | | View Substitute Statistics Inherited From | 1 |
| Accour | nt Codes | | |
| *[Al] | | | = |
| 001 | | | |
| Client 8 | Buttons | | |
| *[Al] | | | |
| Directo | ry Status Columns | | |
| "[AI] | | | |
| Activated | | | |
| Forward I | Number | | |
| Logged In | 1 | | |
| Notes | | | |
| On Phone | | | ~ |
| < | | ш | > |
| Artuance | d Access Details | | |

5. In the Category list, click People.

- 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.

| | | Sec | curity Rights | |
|---|--|--|------------------------------|-------|
| Category: | <al></al> | | ✓ Search: | Clear |
| Show or | nly selected items and g | roups | | |
| Name | | Has Right | Inherited From | ^ |
| Client R | lights | | | |
| Account C | Code Verification | ~ | | = |
| Mini Mode Monitor C Multiple C Orbit Que | e Client Client Templates olumns alls ue t Connections Rules | | Default User Default User | ~ |
| Advances | d Access Details | Second se | 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.

| Category: | People | | ~ | Search: | | Cle | ar |
|-------------|--------------------------|-----------|------------|------------|---------------------|-----|----|
| Show only | selected items and group | 25 | | | | | |
| Name | | View | Substitute | Statistics | Inherited From | | ^ |
| Account | Codes | | | | | | = |
| *[AI] | | × 1 | | | | | = |
| 001 | | | | | | | |
| Client But | ttons | | | | | | |
| *[Al] | | 4 | | | Default User | | |
| Directory | Status Columns | | | | | | |
| "[AI] | | 4 | | | Agent, Default User | | |
| Activated | | | | | | | |
| Forward Nur | mber | | | | | | |
| Logged In | | | | | | | |
| Notes | | | | | | | |
| On Phone | | | | | | | ~ |
| < | | | - 111 | | | > | |

- 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.

| ategory: <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 | ~ |
| < | 7.000 | ш | > |
| Advanced Access Details | | | |

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.

| | | Acce | ss Control | | |
|-----------|--|------------|-----------------|---------------------|-------|
| ategory: | People | | Search: | | Clear |
| Show or | nly selected items and grou | ups | | | |
| Name | | View Subst | tute Statistics | Inherited From | ~ |
| Accoun | nt Codes | | | | |
| *[Al] | | ~ | | | |
| 001 | | | | | |
| Client B | Buttons | | | | |
| *[Al] | | 4 | | Default User | |
| Directo | ry Status Columns | | | | |
| [AI] | Tarana seria de la composición de la c | * | | Agent, Default User | |
| Activated | 1 | | | | |
| Forward M | Number | | | | |
| Logged In | 1 | | | | |
| Notes | | | | | |
| On Phone | 1 | | | | ~ |
| | | 3 | 11 | | > |

- 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.
- 2. Click the Security tab then click Security Rights. The Security Rights dialog box appears.

| Category: | <ai></ai> | | ✓ Search: | Clear |
|---|---|-----------|------------------------------|-------|
| Show on | ly selected items and grou | ps | | |
| Name | | Has Right | Inherited From | ^ |
| Client R | ights | | | |
| Account C | ode Verification | ¥ . | | = |
| Conferenc Customize Manage C Mini Mode Monitor Co Multiple Co Orbit Que | : Client lient Templates olumns alls ue Connections tules | | Default User Default User | ~ |
| Advanced | d Access Details | | | |

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 | | | |
|----------------------------|---|--|---|--|---|--|
| People | | ~ | Search: | | P | Clear |
| ly selected items and grou | ps | | | | | |
| | View | Substitute | Statistics | Inherited From | | 1 |
| t Codes | | | | | | _ |
| | ~ | | | | | |
| | | | | | | |
| uttons | | | | | | |
| | ~ | | | Default User | | |
| y Status Columns | | | | | | |
| | 4 | | | Agent, Default User | | |
| | | | | | | |
| umber | | | | | | |
| | | | | | | |
| | | | | | | |
| 5 | | | | | | 1 |
| | | 111 | | | 3 | > |
| | y selected items and group Codes uttons y Status Columns | y selected items and groups View Codes | People v y selected items and groups View Substitute Codes uttons y Status Columns | People Search: y selected items and groups View Substitute Statistics Codes uttons y Status Columns | People Search: y selected items and groups View Substitute Statistics Inherited From Codes uttons y Status Columns Agent, Default User Agent, Default User | People Search: y selected items and groups View Substitute Statistics Inherited From Codes uttons y Status Columns Agent, Default User |

- 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.

| | | Phone | e Number Cor | figuration | | ? |
|-----------------------------|----------------|------------------|----------------------|------------|--------------------|-------|
| Regional Dial Plan | DID/DNIS | Private Lines | Custom Attribute | s History | | |
| | dit, modify t | ay import, or ea | oport the dial plan. | | Dial Plan | |
| Number Lists Manage t | he number is | sts used by the | dial plan. | | Manage Lists | |
| | he dial plan o | lassifications. | | | Manage Classificat | tions |
| Simulate Call Test the o | sial 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.

| 2 | sips:Z tel:Z | | <ai></ai> | spiž | 592 | 5IP address (explicit) | |
|--------|-----------------|-----------------|-------------|---|----------------|----------------------------------|---|
| 3 | | | 1000 | | | AND READ FIRE ACCEPTED | |
| 3 | tel:Z | | CAEP | sips:Z | SIP | SIP secure | |
| 4 | | | <al></al> | tel:Z | TEL | | |
| | ?@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 | | <all></all> | 411 | Information | | |
| 2 | 1411 | | <ai></ai> | 411 | Information | | |
| 10 | 5551212 | | <al></al> | 411 | Information | | |
| 11 | Nxx5551212 | | <a8></a8> | 411 | Information | | |
| 12 1 | Nox5551212 | | <al></al> | 411 | Information | | |
| 13 +1 | Nox5551212 | | <al></al> | 411 | Information | | |
| 14 NO | 0000000002 | | <al></al> | +100000000002 | International | 11 (or more) digit International | |
| 15 \$ | \$\$00000Z | Tol Free | <al></al> | +1\$\$\$%xx00000Z | Toll Free | | |
| 16 15 | \$\$000000Z | Tol Free | <al></al> | +1\$\$\$*bxx00007 | Toll Free | | |
| 17 +15 | \$\$000002 | Tol Free | <ai></ai> | +1\$\$\$*bxx000012 | Toll Free | | |
| 18. 4 | \$\$\mm00007 | Florked Numbers | <48> | +155\$\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\ | Rinckert | | |

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.

| Input Pattern: | 24.2 | 2 | Standardized | Number: | sip:Z | | 0 |
|-----------------|------------------|--------------|----------------|-------------|-------|--------|------|
| Location Filter | <al></al> | v | Default Dial S | String: | sip:Z | | 0 |
| list Name: | <u> </u> | ۷ | Display String | ġ1 | sip:Z | | 0 |
| Classification: | SIP | v | Edit Base: | | sip:Z | | 0 |
| | Account Code | Verification | Components | ŧ. [| | | ~ [|
| Description: | SIP address (exp | lat) | |] | | | Ŧ |
| Dial Group | Filter | Classificat | ion | Dial String | | Add Gr | quo |
| | | | | | | Edit | ŧ. |
| | | | | | | Riemo | ve |
| | | | | | | 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.

| Pickup Hold Transfer Assistance | 0 | Sally - Basissee | - Callback | × |
|--|---|------------------|------------------------|-------------------------------|
| Callback Complete Retry Later Attempt Failed | Pickup Hold Transfer Assista From: Sally (555-555-5555) Number: 555-5555 Attempt: 1 (Maximum Atter | nce npts: 2) | Make Call | [001] This is a sample accour |
| | Call | vack Complete | Attempt Failed | Responses |
| | 2001681005 0:02:20 📀 Connec | | [Patternipe a survey] | |

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.

| ₹ | Sally - manufacture | - Chat | _ | | |
|---|----------------------|------------------------|---------------------------------|----------|---|
| File Edit View Actio | ns Help | | | | 1 |
| Pickup Hold Transfer D Sally DamianG | isconnect Assistance | potential and a second | count Code 1] This is a samp | le acc 🔻 | |
| IC • Welcome to IC! • Interaction transferred • Interaction alerting Dar • Sally has joined the cor | nianG. | Not | 8 | ~ | m |
| | | • | | + | |

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.

| 1 | Advanced Dialing | Options | | [| 23 |
|---|------------------|------------------|----|--------|----|
| | Number: | 2222222 | | | |
| | Account Code: | 🐻 [001] ABC Bank | | • | |
| | Workgroup: | Sa Marketing | | - | - |
| | | | ОК | 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 for the call | Dial Plan object has Account Code Verification | | 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> . |