



Genesys Care Mobile Application

User Guide

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Table of Contents

1	Introduction	3
2	Installation and Login.....	3
3	Application Usage Overview	5
4	Cases	6
4.1	Search for Cases or Company	7
4.2	Click to Call.....	9
4.3	Request Case Close	10
4.4	Update Case with Message	11
4.4.1	Android.....	11
4.4.2	iOS	12
5	Newsfeeds.....	13
6	Demos	14
7	Contact Us	15
8	Settings	16
8.1	Settings for Android	16
8.2	Settings for iOS:	17
9	Application Security.....	18
10	Questions about This Mobile App	18
11	About This User Guide	19

1 Introduction

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

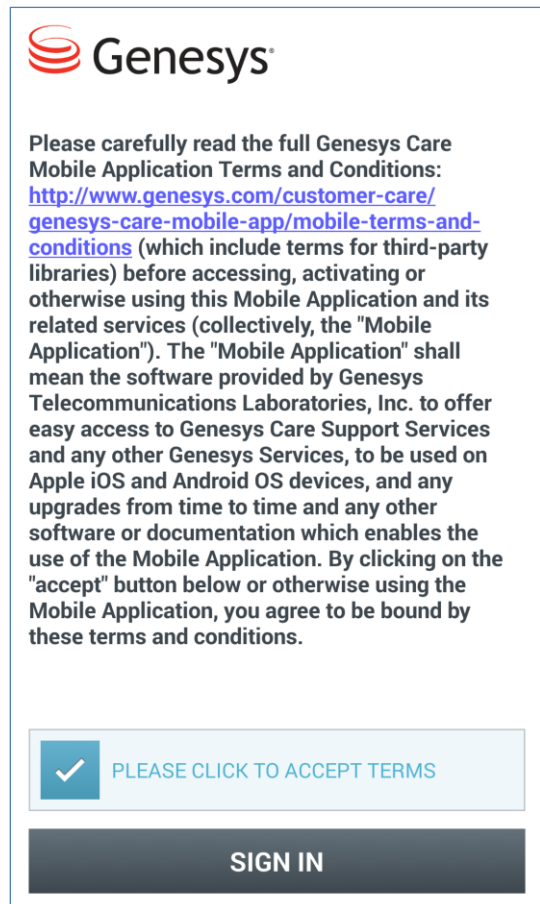
- Review your open cases, including all public case updates
- Post updates to your cases
- “Click to Call” directly to the Support Owner of your case or request a notification when they are next available
- Request case closure
- View News & Events

2 Installation and Login

Prior to downloading the Genesys Care Mobile App, please be sure that you have successfully logged into the Genesys Customer Care [“My Support” Portal](#) at least once.

After the Mobile App has been installed and opened, the app will prompt you to accept the full [Mobile App Terms and Conditions](#).

Figure 1: Mobile App Terms and Conditions



Genesys

Please carefully read the full Genesys Care Mobile Application Terms and Conditions: <http://www.genesys.com/customer-care/genesys-care-mobile-app/mobile-terms-and-conditions> (which include terms for third-party libraries) before accessing, activating or otherwise using this Mobile Application and its related services (collectively, the "Mobile Application"). The "Mobile Application" shall mean the software provided by Genesys Telecommunications Laboratories, Inc. to offer easy access to Genesys Care Support Services and any other Genesys Services, to be used on Apple iOS and Android OS devices, and any upgrades from time to time and any other software or documentation which enables the use of the Mobile Application. By clicking on the "accept" button below or otherwise using the Mobile Application, you agree to be bound by these terms and conditions.

☒ PLEASE CLICK TO ACCEPT TERMS

SIGN IN

After accepting the Genesys Care Mobile App Terms and Conditions, you will be required to enter the following information to login:

- **Email and Password.** Enter the email and password combination you use to enter the Genesys Customer Care “My Support” Portal.
- **PIN.** Enter your Designated Contact PIN number. The PIN is a maximum of 6 digits and can be found in your profile on the Customer Care Portal.
- **Phone #.** Please enter a phone number preceded by a + and your international dialing code.

Examples: +15066635803 or +61212553456

Figure 2: Mobile App Setup and Login

< Setup

Email

Password

PIN

Phone #

Please use your Support Web credentials. Genesys employees, contact: care.mobile@genesys.com

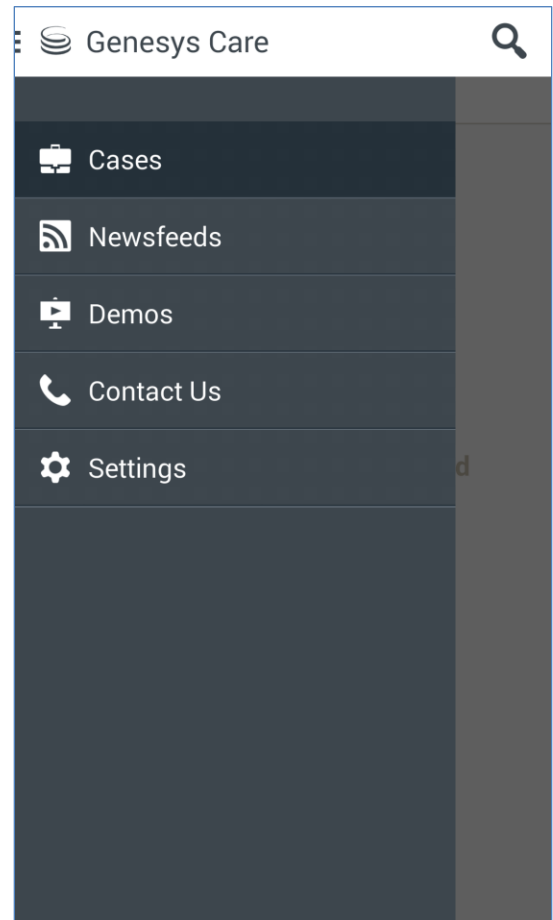
SIGN IN

3 Application Usage Overview

You can access several Genesys Care Mobile App functions on the menu page. Tap the menu icon ☰ to view these options:

- Cases
- Newsfeeds
- Demos
- Contact Us
- Settings (**Please note:** The Settings menu item is only in the Android version. On iOS, settings are accessed outside the app under Settings > Genesys Care. See the “Settings” section in this User Guide for more details.)

Figure 3: Mobile App Menu



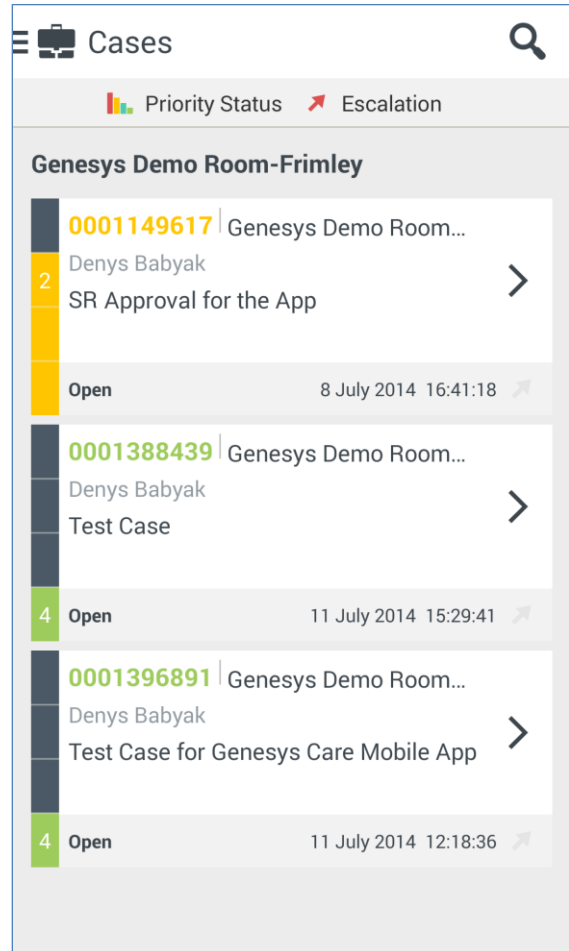
4 Cases

If you are a Designated Contact at a direct customer with a current Service Contract, you will be able to see your non-closed cases and those opened by all other Designated Contacts at your company.

If you work for a Genesys partner, you will be able to see all non-closed cases that your company has opened for end users you represent.

If you are a Genesys employee, you will have the same access that is available to you when you login from your Genesys-assigned device.

Figure 4: Mobile App Case Management



4.1 Search for Cases or Company

Android

To search for a case or company, tap the Search icon at the top right of the Cases window (Figure 5) and enter a case number or company name in the search box (Figure 6). The search tool will attempt to auto-complete your search string after you input three letters or a full case number. Choose an item in the search results list to see that information.

Figure 5: Using Search on Android, Step 1

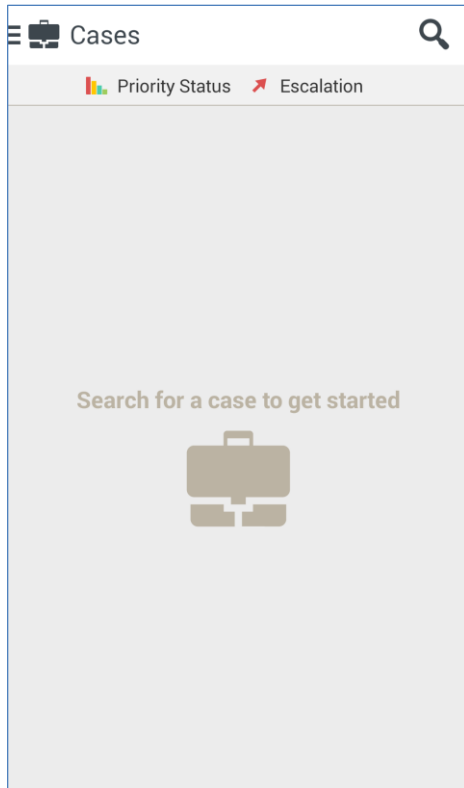
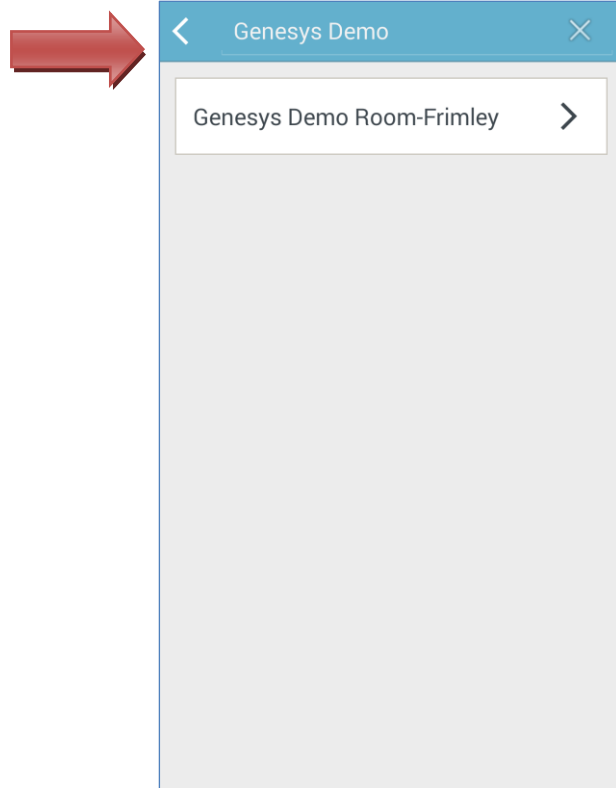


Figure 6: Using Search on Android, Step 2



iOS

To search for a case or company, tap the Search icon at the top right of the Cases window (Figure 7) and enter a case number or company name in the search box (Figure 8). When you are done typing, click the Search button below. Select an item in the Search Results to view that information.

Figure 7: Using Search on iOS, Step 1

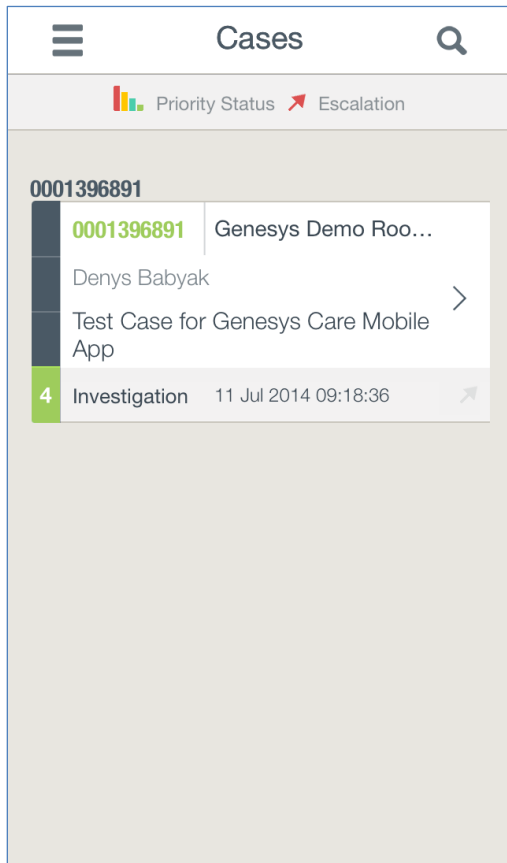
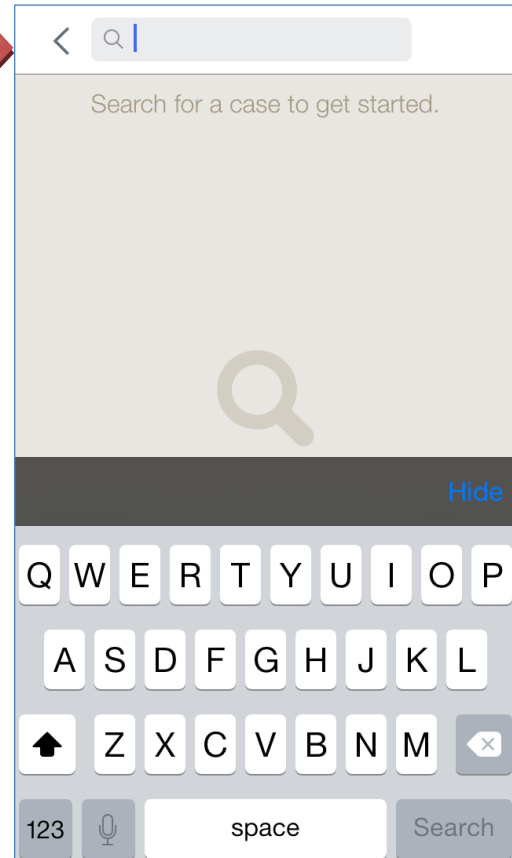


Figure 8: Using Search on iOS, Step 2



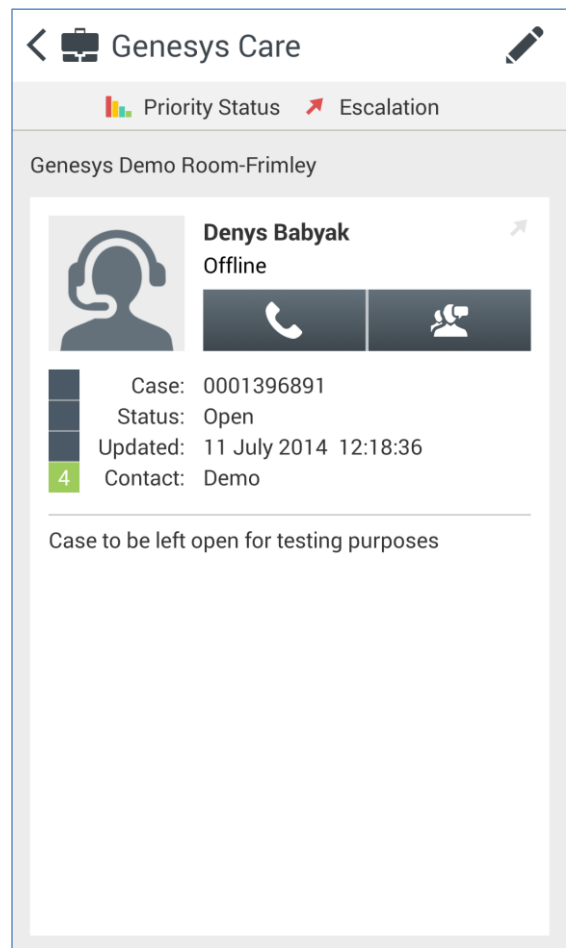
4.2 Click to Call

To call the Genesys Case Owner for one of your cases, select the telephone icon 📞 (Figure 9) within the Case Details window for that case. (This function is available now in EMEA and North America, and coming soon to APAC and LATAM customers.)

If the Genesys Case Owner is not available, you will have the following options:

- **Call Anyway** – routes your call to the closest Genesys Support Center, allowing you to work with another Customer Care analyst who is skilled on the product for which you have opened this Case.
- **Notify Me** – sends you a mobile status notice when the Case Owner is available for you to call.

Figure 9: Mobile App Click to Call



4.3 Request Case Close


To request that Genesys close a case, select the pencil icon  at the top right of the Case Details window for that case (Figure 10) and select the appropriate option (Figure 11).

Figure 10: Requesting Case Close, Step 1

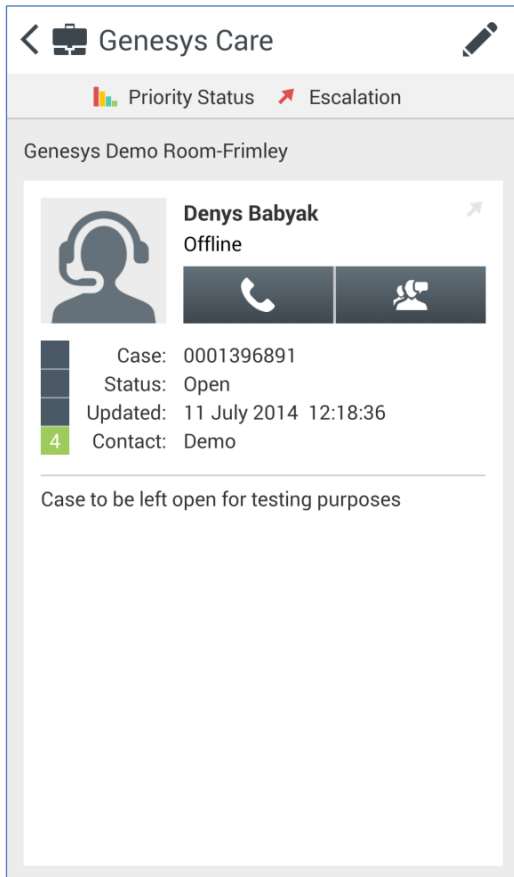
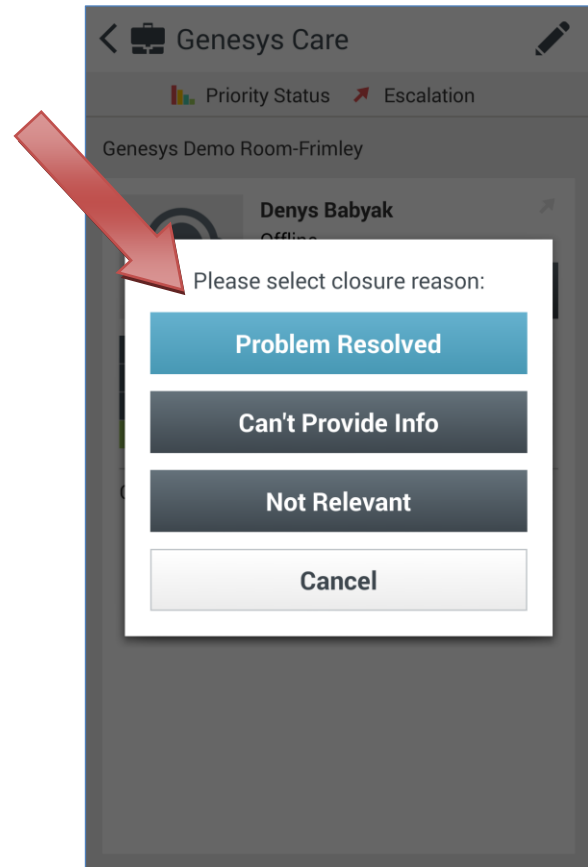


Figure 11: Requesting Case Close, Step 2



4.4 Update Case with Message

4.4.1 Android


To update a case with a message in Android, tap on the chat icon  next to the telephone in the Case Details window (Figure 12). On the Case Updates screen (Figure 13), type an update in the Message text box and tap the Send button. Please note that the icon is different for the iOS version (see next page for reference).

Figure 12: Update Case with Message, Step 1

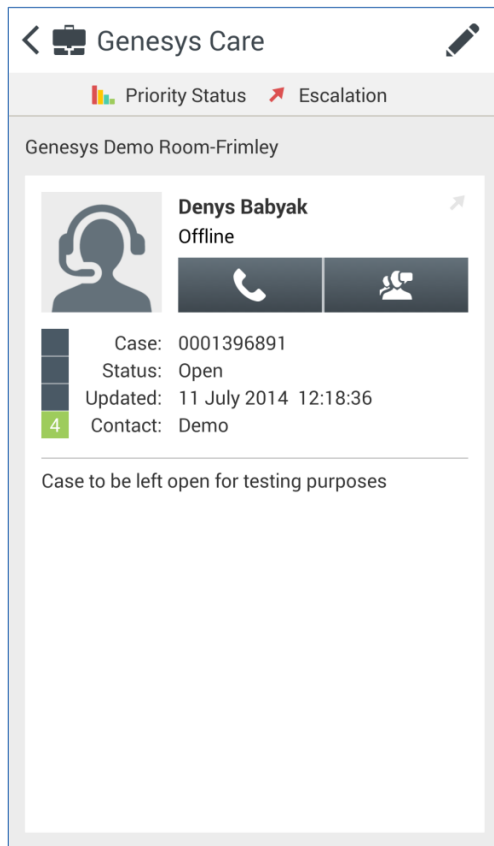
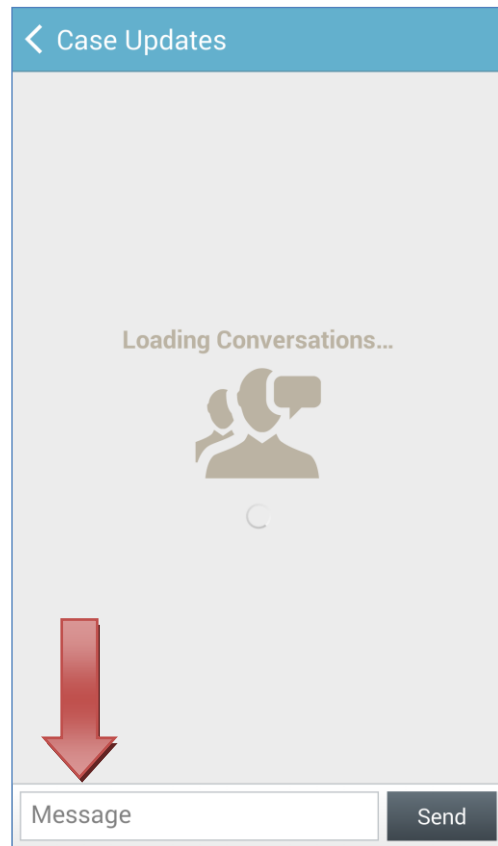


Figure 13: Update Case with Message, Step 2



4.4.2 iOS


To update a case with a message in iOS, tap on the notes icon  next to the telephone in the Case Details window (Figure 14). On the Case Updates screen (Figure 15), type an update in the Message text box and tap the Send button.

Figure 14: Update Case with Message, Step 1

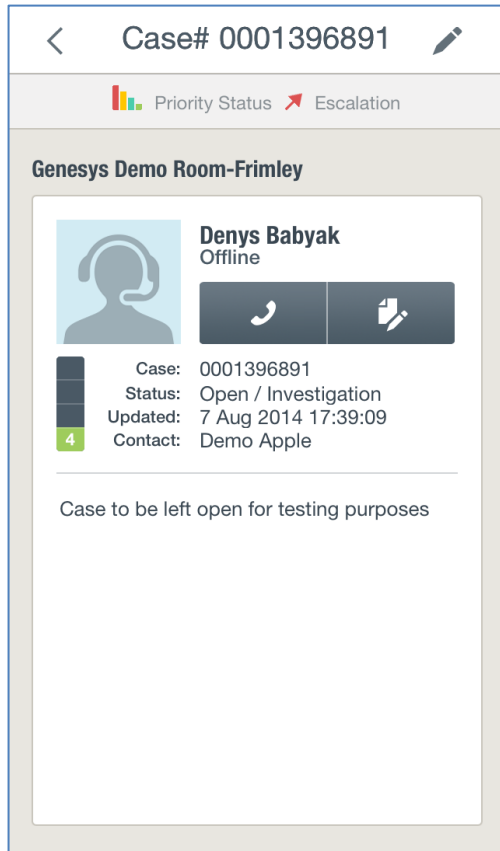


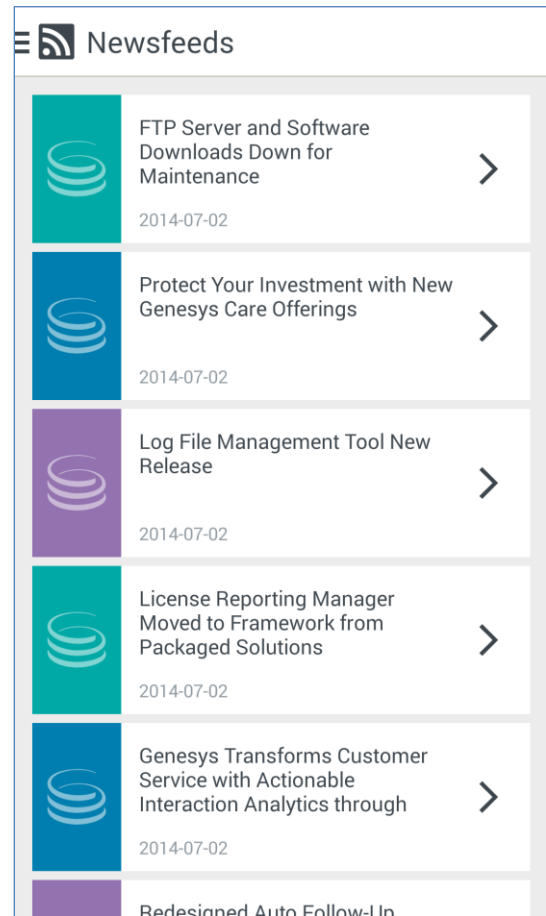
Figure 15: Update Case with Message, Step 2



5 Newsfeeds

When you select the Newsfeeds menu item, the latest Customer Care news announcements are downloaded to your phone. Pull down on the Newsfeeds screen to refresh the page.

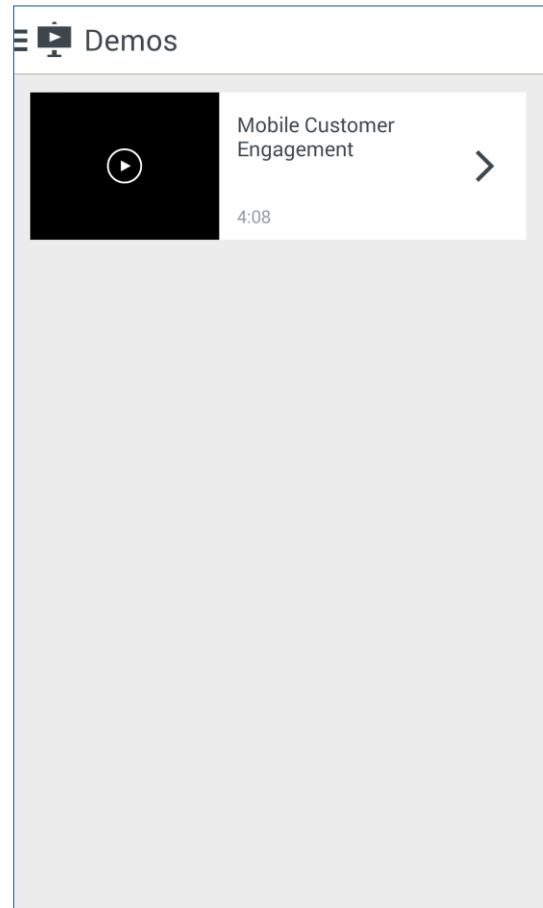
Figure 16: Genesys Newsfeeds



6 Demos

Demos are available by selecting the Demos option on the Menu page. Tap on a Genesys video in the Demos screen and you will be prompted to play the video. (By default, the video will be launched in YouTube.)

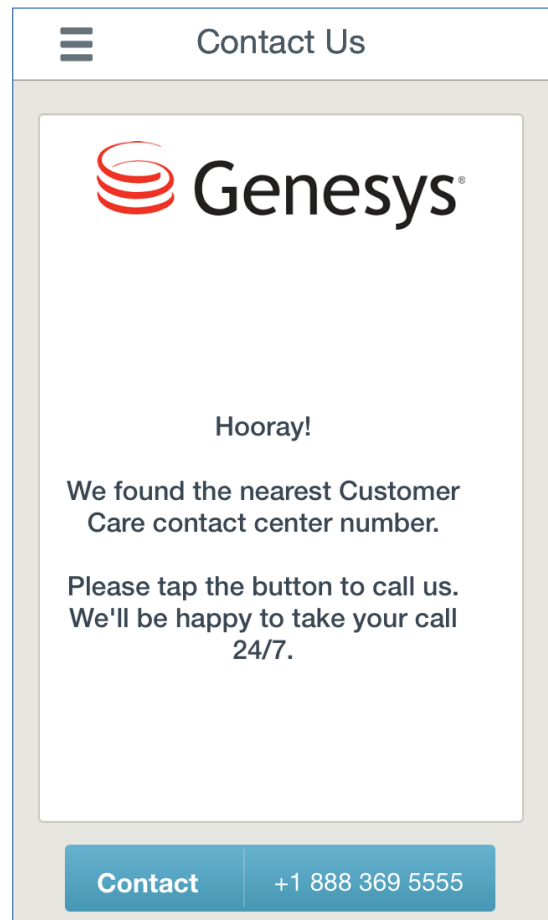
Figure 17: Genesys Demos



7 Contact Us

When you select Contact Us in the menu, the app provides contact information for the nearest Customer Care center, based on your location. If the mobile app is not able to determine your location (for example, if Location Services is not enabled on your phone), all Customer Care contact info will be displayed, and you can choose an available location to call.

Figure 18: Mobile App Contact Us



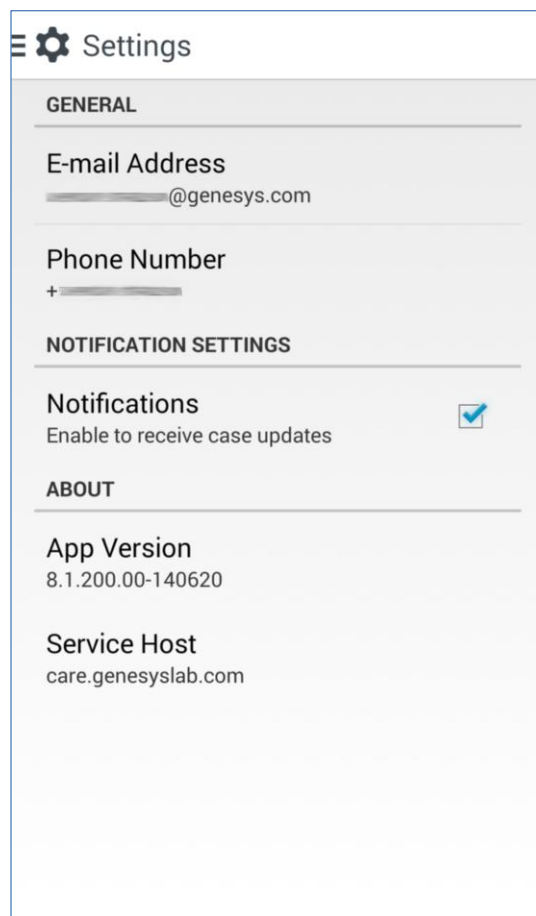
8 Settings

8.1 Settings for Android

Select the Settings menu option to see the email and phone number associated with the mobile app as well as the mobile app version. You may change your phone number at any time.

If you want to receive notifications on your mobile phone for Case Updates and New Cases, check the Notifications box on the Settings window. Notifications will appear in the Notification bar (top of the phone) and can be selected from the Notifications pull-down.

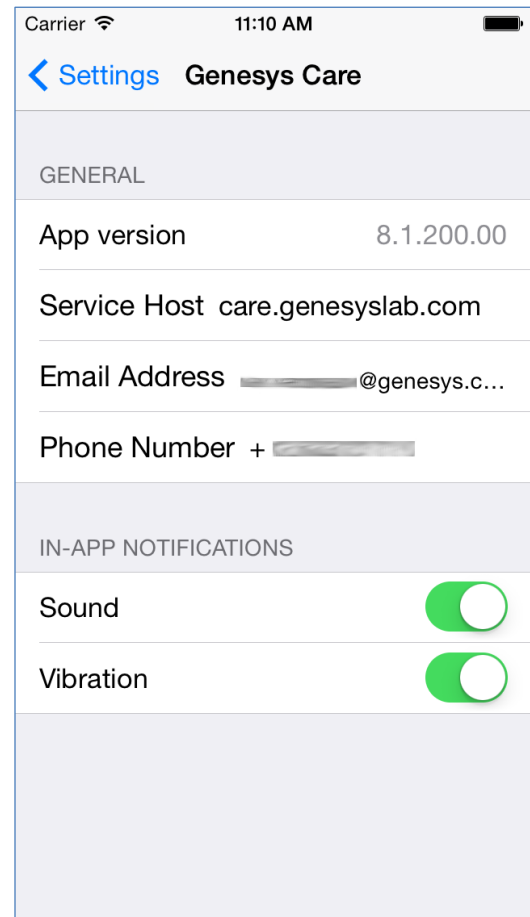
Figure 19: Mobile App Android Settings



8.2 Settings for iOS:

Settings for the iOS app are found outside of the app under Settings > Genesys Care. The phone number and email address can be changed on this screen. If you want to receive notifications on your mobile phone for Case Updates and New Cases, select Sound and/or Vibration. Notifications will appear in the Notifications bar (top of the phone), and can be selected from the Notifications pull-down.

Figure 20: Mobile App iOS Settings



9 Application Security

Genesys has a strict [Privacy Policy](#) that applies to this mobile app.

In addition to the [Mobile App Terms and Conditions](#) that you agree to during installation, the [Customer Care Terms and Conditions](#) that apply to use of the Genesys Customer Care portal also apply to use of the Mobile App.

If you minimize the app for a small period of time or your phone enters sleep mode, you will be asked to re-enter your PIN number before you can access the app again. (Figure 21 shows Android login, and Figure 22 shows iOS login.)

Figure 21: Mobile App Android Reactivate Screen

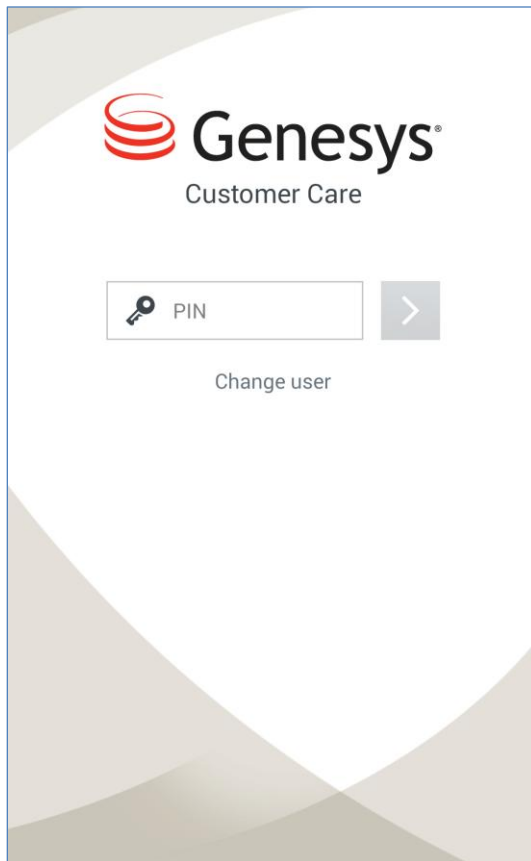
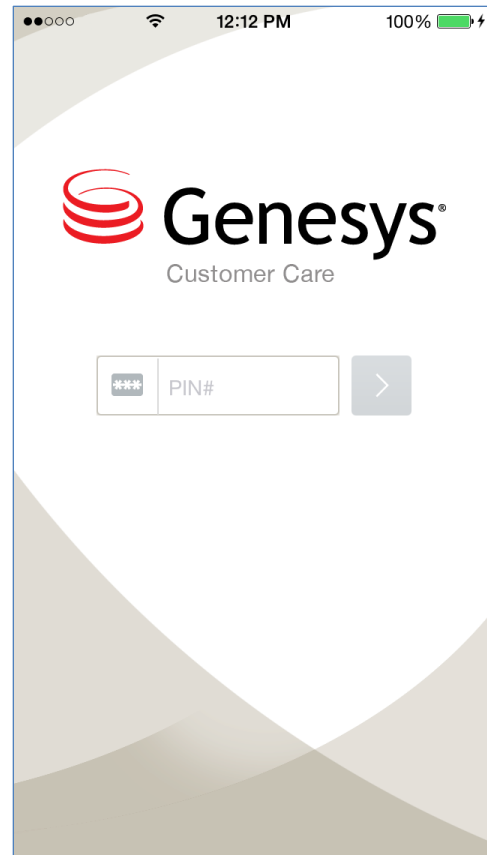


Figure 22: Mobile App iOS Reactivate Screen



10 Questions about This Mobile App

For any questions about the Genesys Care Mobile App, please contact Genesys Customer Care: <http://www.genesys.com/customer-care/contact-us>.

11 About This User Guide

The information contained herein is proprietary and confidential and cannot be disclosed or duplicated without the prior written consent of Genesys Telecommunications Laboratories, Inc.

About Genesys

Genesys is the market leader in multi-channel customer experience (CX) and contact center solutions in the cloud and on-premises. We help brands of all sizes make great CX great business. The Genesys Customer Experience Platform powers optimal customer journeys consistently across all touchpoints, channels and interactions to turn customers into brand advocates. Genesys is trusted by over 4,500 customers in 80 countries to orchestrate more than 100 million digital and voice interactions each day. Go to www.genesys.com for more information.

Notice

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Your Responsibility for Your System's Security

You are responsible for the security of your system. Product administration to prevent unauthorized use is your responsibility. Your system administrator should read all documents provided with this product to fully understand the features available that reduce your risk of incurring charges for unlicensed use of Genesys products.

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Technical Support from VARs

If you have purchased support from a value-added reseller (VAR), please contact the VAR for technical support.

Ordering and Licensing Information

Complete information on ordering and licensing Genesys products can be found in the *Genesys Licensing Guide*.

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