

# **vCX360**

# **Cloud CX Dashboard**

**Config Assist Guide**  
Genesys Appfoundry

# Contents

<b>CONTENTS .....</b>	<b>ii</b>
<b>1 INTRODUCTION .....</b>	<b>1</b>
1.1 PURPOSE .....	1
1.2 REVISION HISTORY .....	1
1.3 INTENDED AUDIENCE AND READING SUGGESTIONS .....	1
1.4 DEFINITIONS, ACRONYMS, AND ABBREVIATIONS .....	1
<b>2 CONFIGURATIONS .....</b>	<b>3</b>
2.1 PREREQUISITES .....	3
<b>3 SOFTWARE INSTALLATION.....</b>	<b>4</b>
INSTALLATION .....	4
3.1 .....	4

# 1 Introduction

## 1.1 Purpose

Applications like Cloud CX Dashboard is made accessible through the Genesys Appfoundry. This document guides the Genesys master admin to install the Cloud CX dashboard application through the genesys Appfoundry for a Genesys organization where the user prefers to select their partnered organization to retrieve the billing information.

## 1.2 Revision history

Document Version	Author	Date (mm/dd/yyyy)	Comments
Initial Draft	Josphine Christina	10/12/2022	

## 1.3 Intended audience and reading suggestions

This Setup Guide is intended to be used by genesys master admin who will be responsible for initial setup and possible upgrades in future.

For product functionalities refer to product user guide.

## 1.4 Definitions, acronyms, and abbreviations

Term	Definition
Master Administrator	It is a Genesys role, anyone with this role can view and change everything in Interaction Administrator, and assign or remove all levels of rights for any other Customer Interaction Center account, including others with master administrator rights
Authorized Organization	It is used to establish a secure relationship with another Genesys cloud organization, which allows the user to login into another organization. It is also referred as Partner organization or Trustee organization or Paired organization. For further details please refer to: <a href="https://help.mypurecloud.com/articles/about-authorized-organizations/">https://help.mypurecloud.com/articles/about-authorized-organizations/</a>
OAuth Client	It allows the users to authenticate against Genesys cloud. For further details please refer to: <a href="https://help.mypurecloud.com/articles/create-an-oauth-client/">https://help.mypurecloud.com/articles/create-an-oauth-client/</a>

Term	Definition
Role	A role is an entity based on which a user is allowed to perform various actions in Genesys Cloud. For further details please refer to: <a href="https://help.mypurecloud.com/articles/add-roles/">https://help.mypurecloud.com/articles/add-roles/</a>

## 2 Configurations

### 2.1 Prerequisites

For a user to install an application, the following are the prerequisites:

- The user must have purchased the application from Genesys Appfoundry
- The user must have the “Master Admin” role to perform the initial setup.

Please note that this document will guide you to complete the configuration setup, in continuation with the previously left setup.

## 3 Software Installation

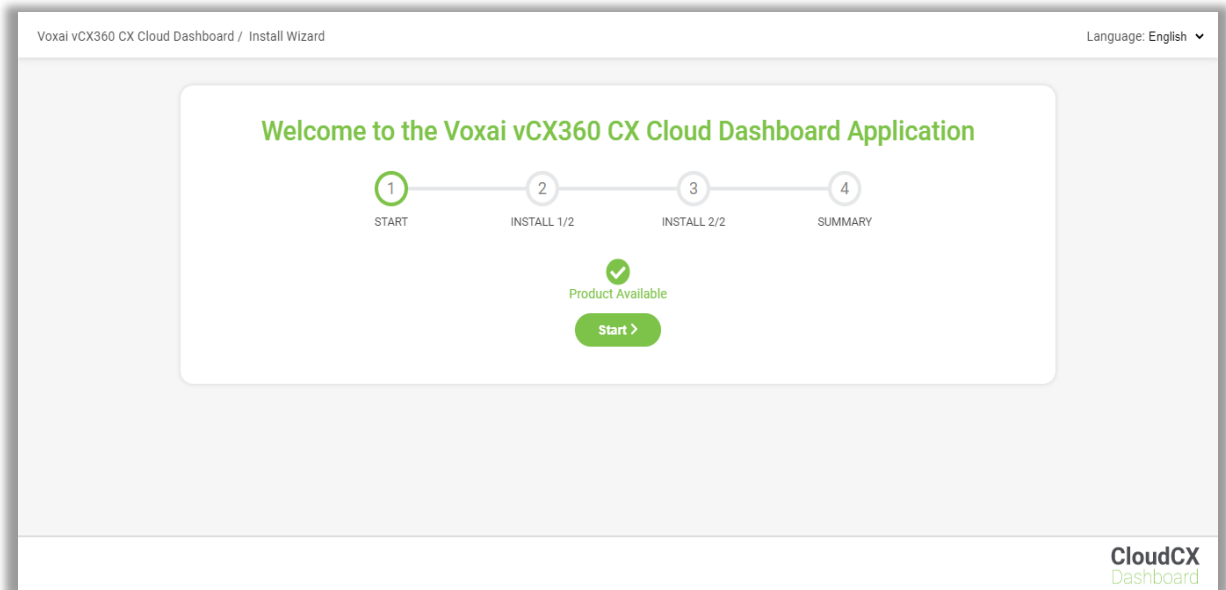
### 3.1 Installation

The install wizard application allows the users to install applications like vCX360 Cloud dashboard monitoring in Genesys Administration. It can be installed based on the Group level access.

Config Assists is an application wizard

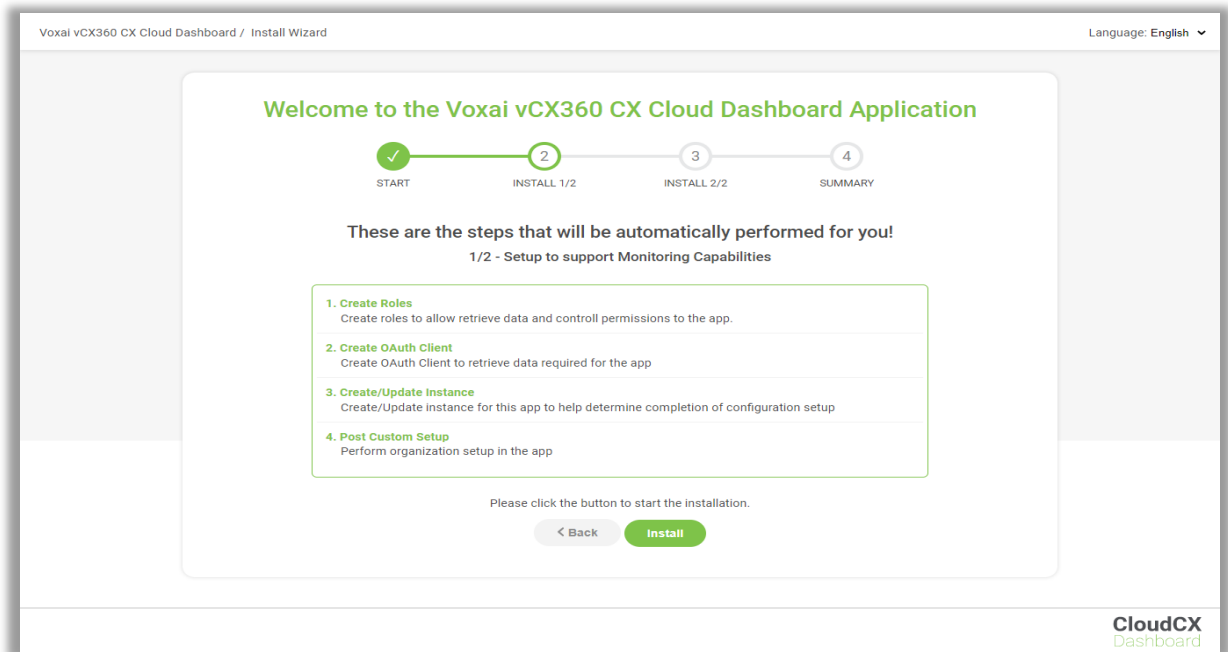
To have the vCX360 Cloud dashboard monitoring in the list of applications, it is necessary to install it through the App foundry, which is a solution-centric place for all genesys platforms.

1. Go to the required application in the Appfoundry and initiate it. Then Click on Start button.





2. As the installation setup is initiated, in the backend
  - ✚ A Role is created, which allows the control permissions to the application
  - ✚ An OAuth client is created, to retrieve data which is required for the application
  - ✚ An instance of the application is created or updated if already exists. This helps to determine completion of configuration setup.
  - ✚ After the setup is complete, organization setup is performed in the application.

Click on Install button as shown in the below screen that is displayed after the Start button is clicked in the process of setup.



3. For applications like Billing dashboard, it is necessary to have access to the organization’s billing information. Currently Genesys allows only a partnered organization to retrieve the organization’s billing information on their behalf (using public APIs).

To suffice the purpose there are 2 choices for selecting an organization for pairing, as mentioned below:

-  Use Voxai Client Pair Indicates trust between the Voxai Client organization and current organization must be created, to retrieve billing information.  
If this option is selected then it means that the current organization is building trust with the Voxai Client organization, which can be used to retrieve billing information.
-  Use own client Pair Indicates that the user has own client organization in the same region for retrieving billing information to complete the application setup.  
If this option is selected then it means that own client organization can be used to retrieve billing information.

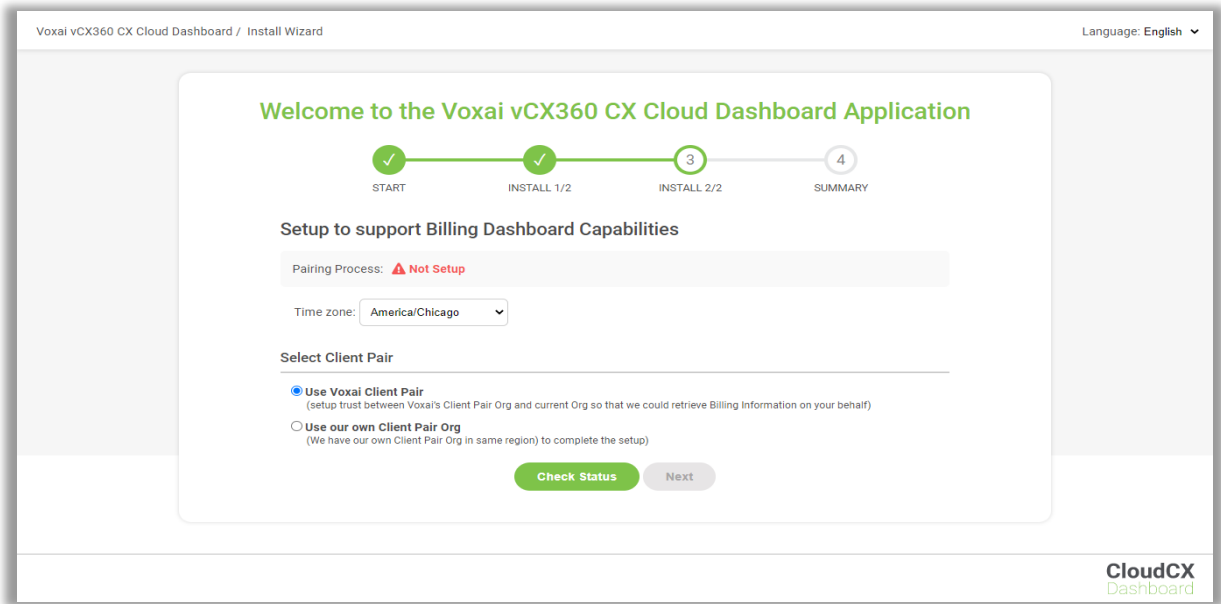
**Note:** When the user prefers to pair with the own client, then the organization setup is to be completed using the Config Assist wizard.

For more information on organizations refer to the following link:

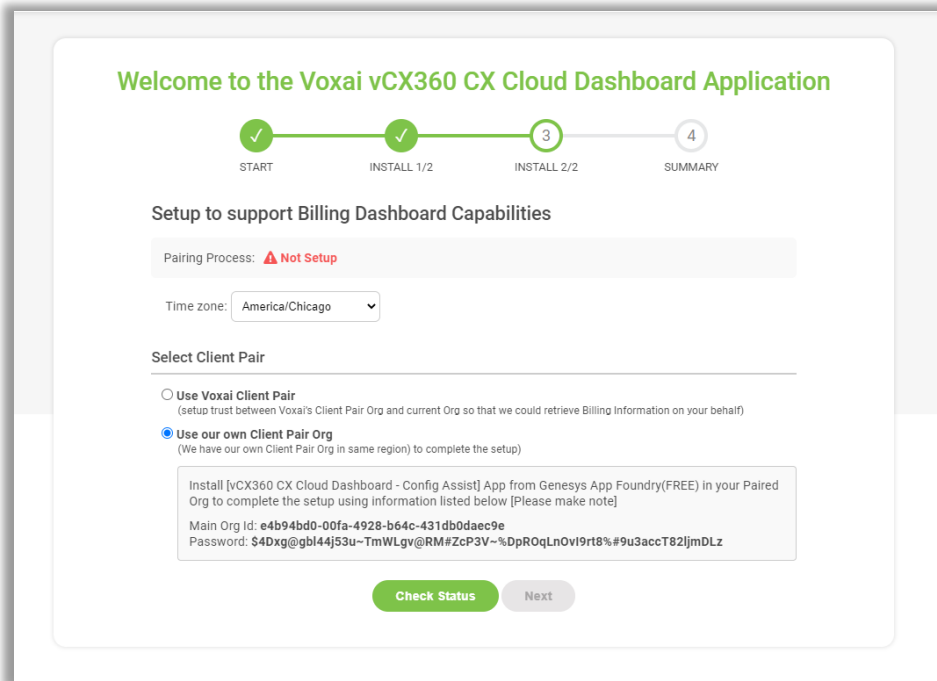
<https://help.mypurecloud.com/articles/about-authorized-organizations>

For help reach out to our mailbox:

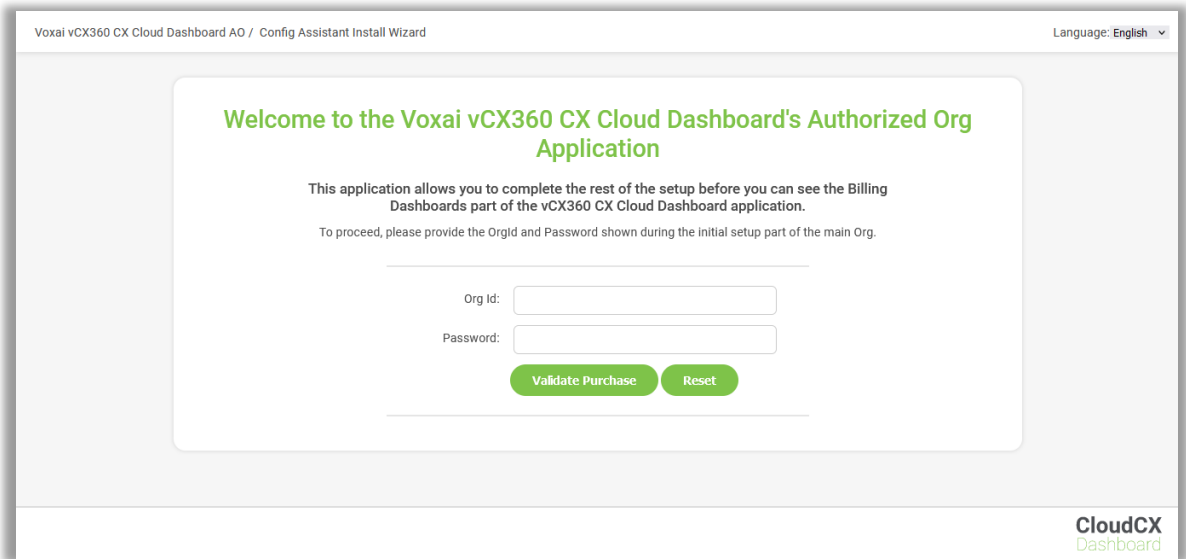
Select time zone and the Client organization for pairing, which allows the application to retrieve the billing information.



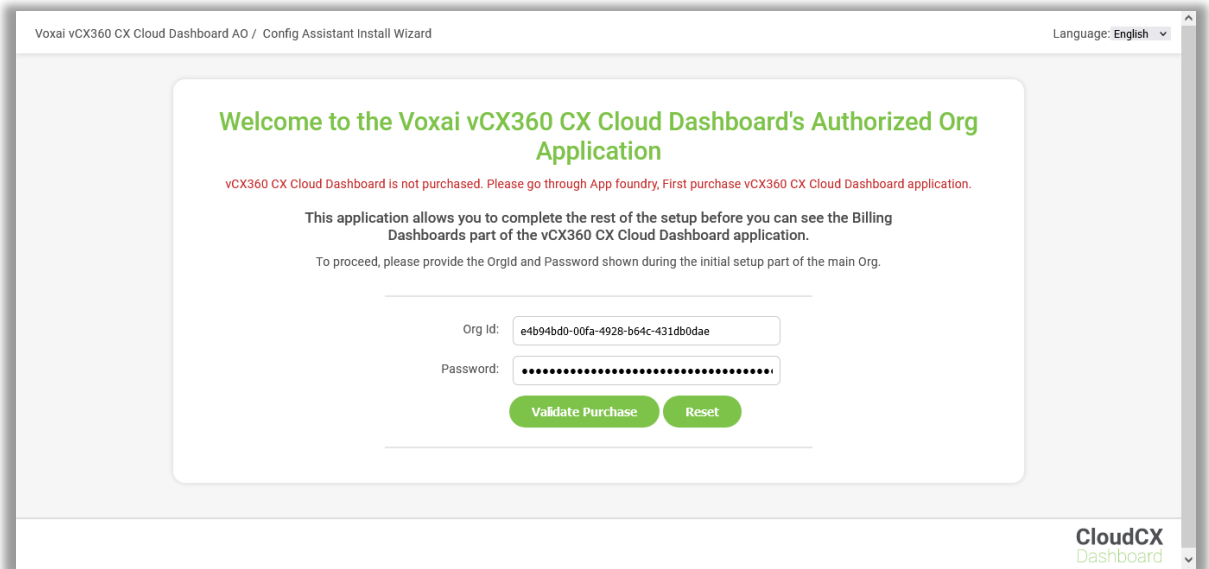
4. In the above step, if **Use our own Client Pair Org** is selected then the Organization Id and password are generated.



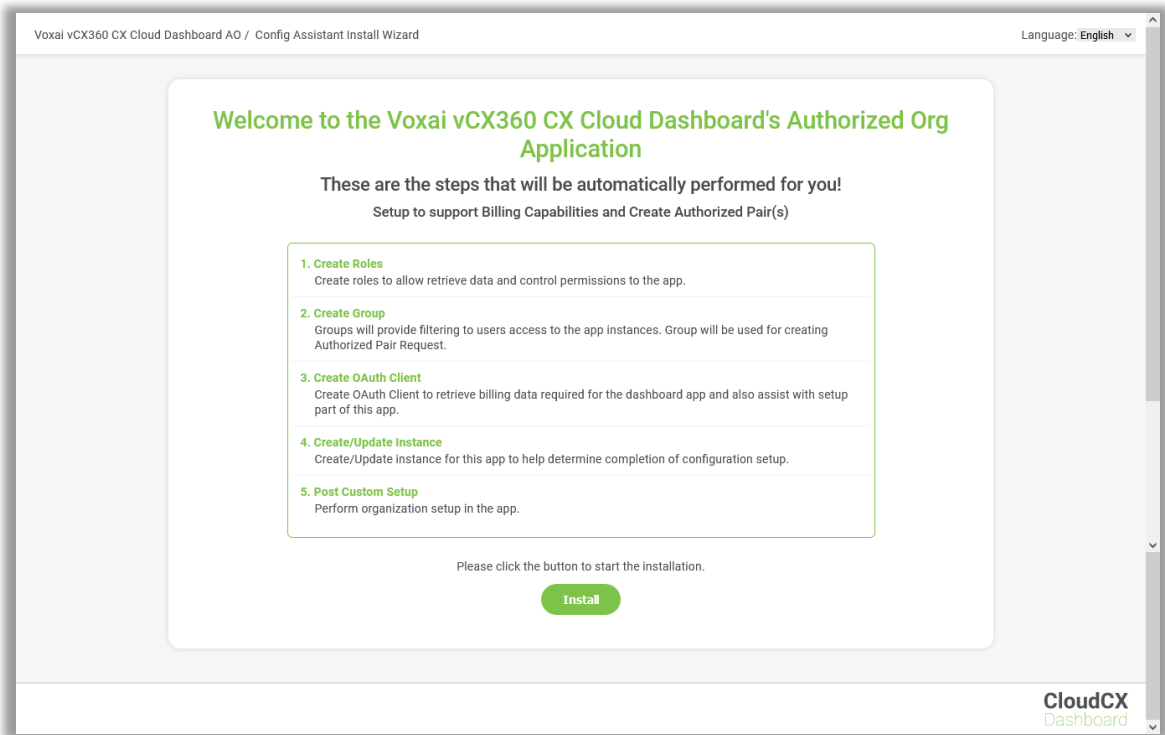
5. Now, the user needs to run the Config Assist wizard and below is the home screen displayed when it is run.



6. Enter the Org Id and password that are generated in the genesys installation wizard. When incorrect details are entered for Org Id and password then an error message is displayed as shown below.



7. Enter the Org Id and password that are generated in the genesys installation wizard. On successful validation of the details entered, below screen is displayed.



As the installation setup is initiated, in the backend

✚ A Role is created, which allows the control permissions to the application.

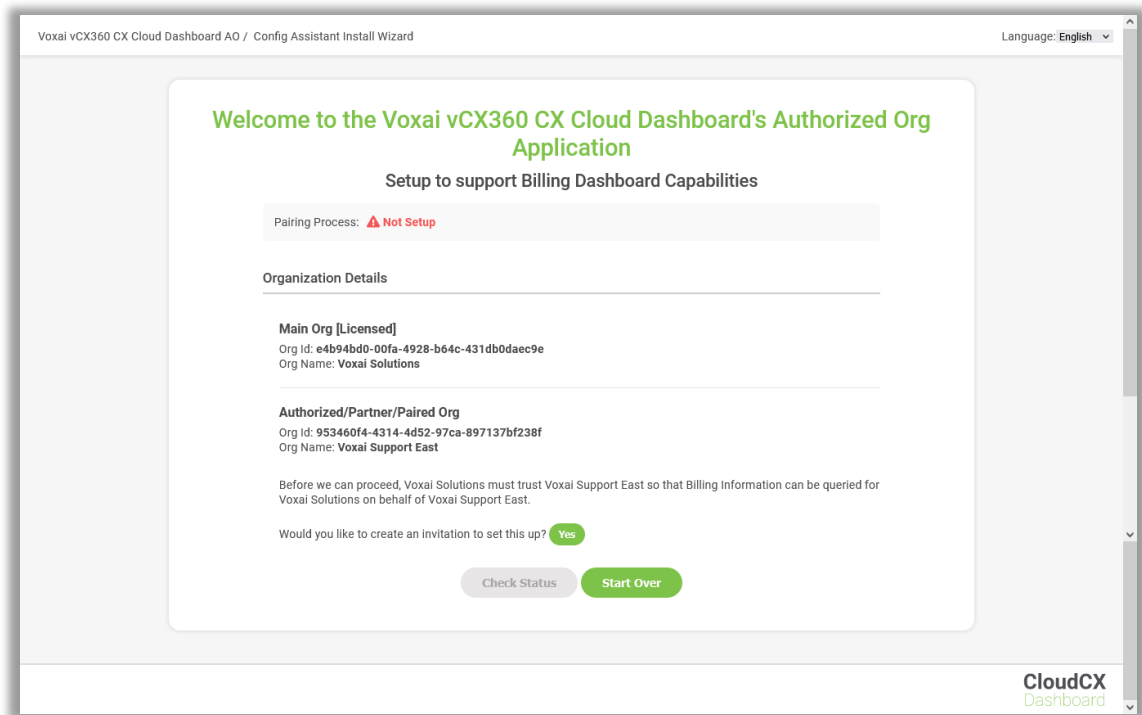
Below are the list permissions that are assigned to the new role that is created:

Permission	Description
Affiliate Organization > client Billing > view	
Analytics > Agent Conversation Detail > View	Query for an agent's conversation details Cloud CX 3
Analytics > Bot Aggregate > View	Query for bot aggregates
Analytics > Conversation Aggregate > View	Query for Conversation aggregates
Authorization > Division > View	View Divisions
Billing > Subscription > View	View subscriptions
Integrations > Integration > View	View integration
OAuth > Client > View	View OAuth clients
Routing > Queue > View	View queue and queue membership
Telephony > Plugin > All	Telephony plugin full access
Telephony > Sites > View	View telephony sites Communicate
UI > myOrganization > View	View directory organization in the UI
Analytics > Conversation Detail > View	Query for conversation details Wallboard
Analytics > Queue Observation > View	Query for queue observations Wallboard

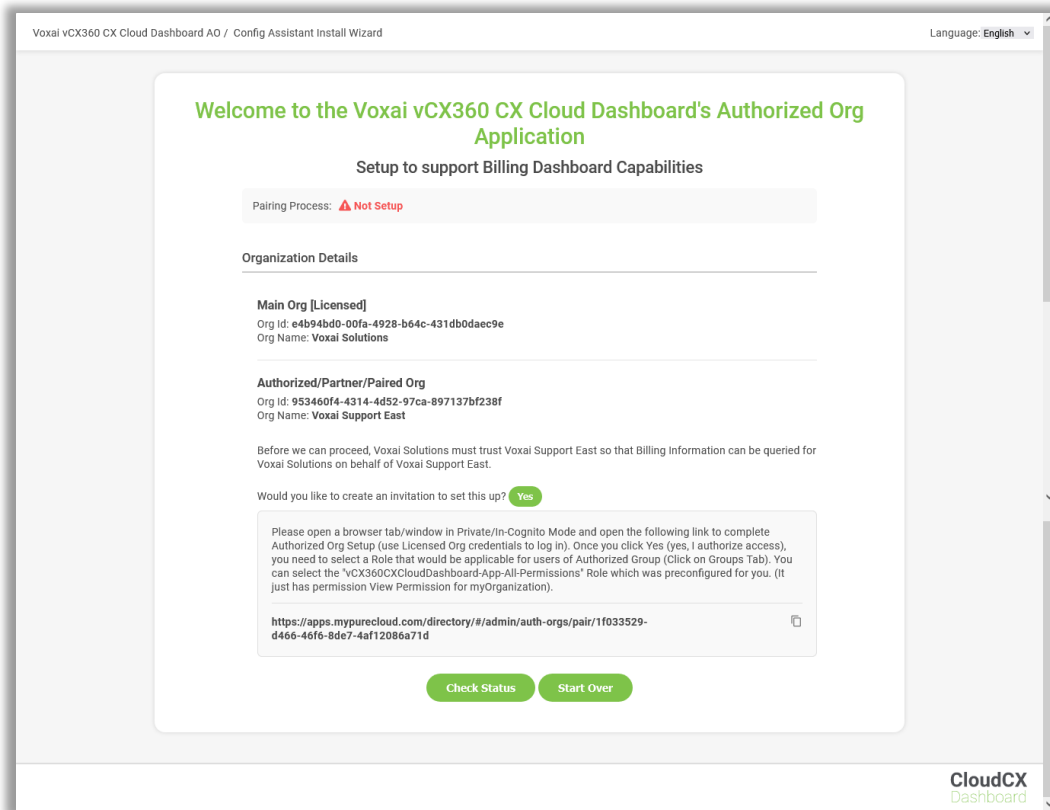
Analytics > User Aggregate > View	Query for user aggregates Wallboard
Analytics > User Detail > View	Query for user details Cloud CX 3
Analytics > User Observation > View	Query for user observations Cloud CX 3
Audits > Interaction Details > View	View Interaction Details audit trail Cloud CX 3
Conversation > Message > View	View conversation messages Cloud CX 3
Directory > Group > View	View groups
Integration > BotConnector > View	View information about the Bot Connector settings
Limits > Organization > View	View organization limits and change requests
Messaging > Integration > View	View integrations created with a messaging provider Cloud CX 3
Routing > Call Route > View	View call routes
SMS > Phone Number > View	View an SMS phone number Cloud CX 3
UI > Agent Activity > View	View Agent Activity view Cloud CX 3

- ✚ A Group is created, which will be used while an Authorized pairing request is created.
- ✚ An OAuth client is created, to retrieve data which is required for the application
- ✚ An instance of the application is created or updated if already exists. This helps to determine completion of configuration setup.
- ✚ After the setup is complete, organization setup is performed in the application.

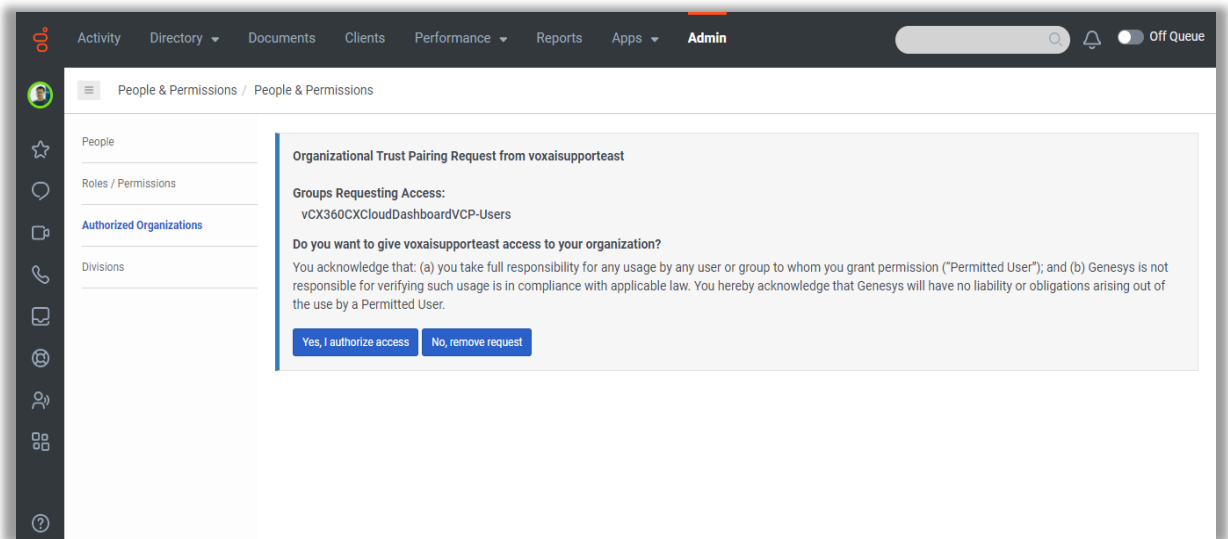
8. Verify the details and Click on **Install** button to initiate the installation process. Below is the screen displayed:



9. Verify the details displayed and click on **Yes** button. This enables to create an invitation in process of building the trust with the pairing organization. Below is screen displayed after the **Yes** button is clicked.



10. Copy the link displayed and open it in the browser in private or incognito mode. Then login to genesys using the credentials related to main organization. Below is the screen displayed.



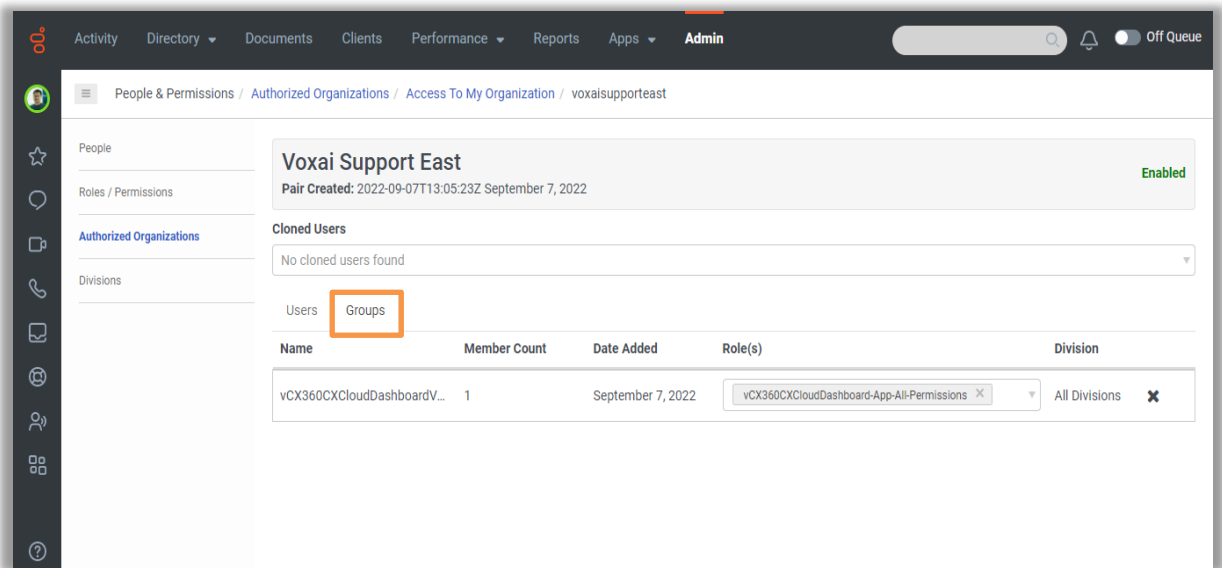
11. Click on “**Yes, I authorize access**” to accept the pairing request which is from Voxai organization. Shown below is an example voxai organization: voxaisupporteast

For more information refer to the following link: <https://help.mypurecloud.com/articles/about-authorized-organizations>

12. As soon as the pairing request is accepted, user will be redirected to the Authorized organizations section, click on groups tab, related to vCX360 Cloud dashboard monitoring is added.

Assign the new role that is created as mentioned in Step 2, to this group.

Below is the screenshot of the same:



**Note:** The role mentioned in the above screenshot is a preconfigured one, which has only permissions for the vCX360 CX Cloud Dashboard application (Integration: vcx360cxclouddashboard:view). From security point, this is the only permission available.

13. Now go back to the main installer wizard page as displayed in Step 4. As the pairing process is successfully done the status displayed for the field **Pairing Process** is updated as Validated. Now click on **Check Status** button as shown below:

**Welcome to the Voxai vCX360 CX Cloud Dashboard Application**

START    INSTALL 1/2    **INSTALL 2/2**    SUMMARY

**Setup to support Billing Dashboard Capabilities**

Pairing Process: **Validated**

Time zone: **America/Chicago**

**Select Client Pair**

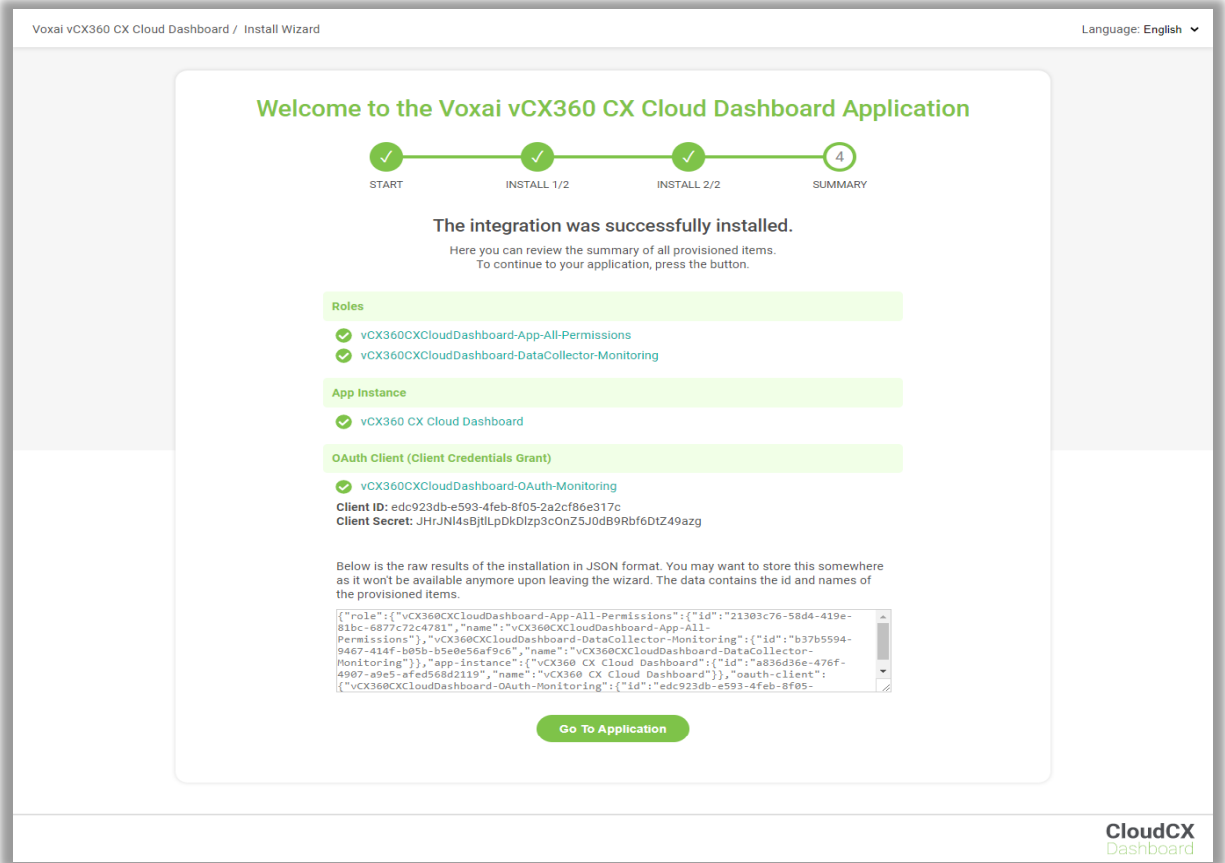
Use Voxai Client Pair  
(setup trust between Voxai's Client Pair Org and current Org so that we could retrieve Billing Information on your behalf)

**Use our own Client Pair Org**  
(We have our own Client Pair Org in same region) to complete the setup)

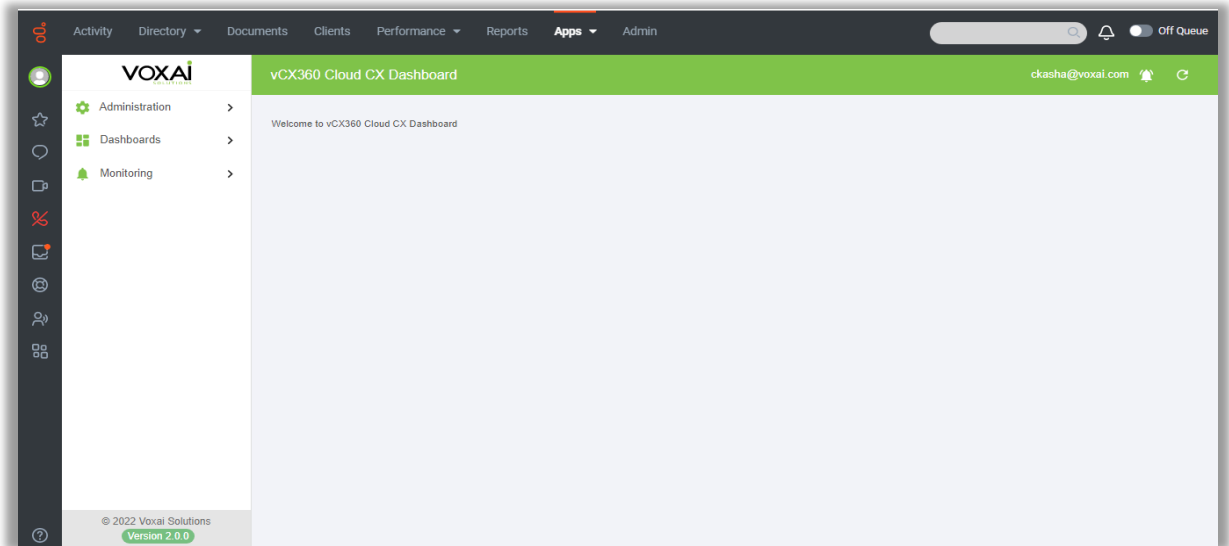
Install [vCX360 CX Cloud Dashboard - Config Assist] App from Genesys App Foundry(FREE) in your Paired Org to complete the setup using information listed below [Please make note]

Main Org Id: **e4b94bd0-00fa-4928-b64c-431db0daec9e**  
Password: **S4Dxg@gb144j53u~TmWLGv@RM#ZcP3V~%DpROqLnOvi9rt8%#9u3accT82ljmDLz**

14. Verify the details mentioned as application is successfully integrated onto Genesys platform as shown below. Click on **Go to Application** button.



15. The user is auto logged in to the application, as shown in the below screen. If the application is not loaded as expected, then perform a hard refresh by pressing Ctrl+R.



After the installation is successful, user can access the application in the Genesys Cloud home page with the application added under the **Apps** section. Then the application is loaded.

Only Genesys users with Master Admin role will be able to seamlessly access to the application. For additional users (users without Master Admin role), users need to be setup prior in the application, refer to the application user guide.

## About Voxai

For more than 18 years, Voxai has been the trusted partner for customer-centric brands for architecting, implementing, and managing Contact Centers and Customer Experience (CX) solutions. We combine forces with Genesys to recreate experiences centered on a unique brand purpose that close the gap between brand promise and customer experience. With a laser focus on core purpose, we help our clients meet their customers' needs, engaging them in brand-relevant experiences and shifting the focus from cost to growth. To learn more about how we help our customers deliver exceptional agent and customer experience, visit [voxai.com](http://voxai.com)

635 Fritz Drive, Suite 220 Coppell, Texas 75019  
Telephone: 972-691-3333



[/voxai-solutions](https://www.linkedin.com/company/voxai-solutions)



[@VoxaiSolutions](https://twitter.com/VoxaiSolutions)