

vCX360

Cloud CX Dashboard

Application Installer Guide
Genesys Appfoundry

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1 Introduction

1.1 Purpose

Cloud CX Dashboard is an application that supports a user to track and monitor the billing elements and services usage. Now this application 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.

1.2 Revision history

Document Version	Author	Date (mm/dd/yyyy)	Comments
Initial Draft	Josphine Christina	08/09/2022	

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 further product functionality details please refer the 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. For further details please refer to: https://help.mypurecloud.com/articles/about-authorized-organizations/
OAuth Client	It allows the users to authenticate against Genesys cloud. For further details please refer to: https://help.mypurecloud.com/articles/create-an-oauth-client/

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: https://help.mypurecloud.com/articles/add-roles/

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

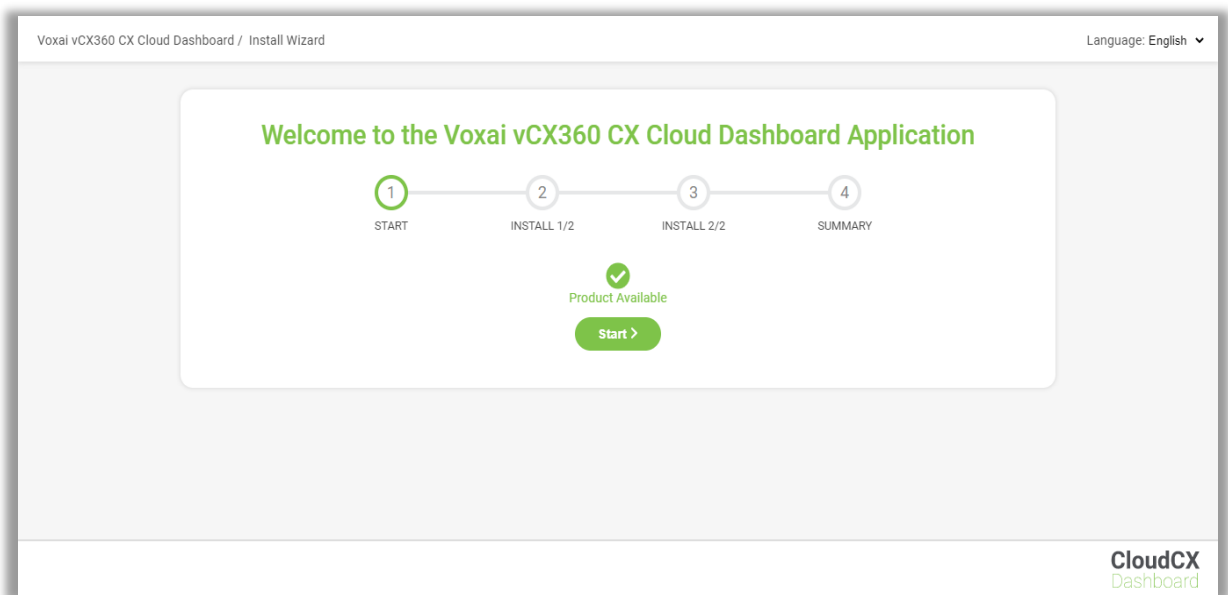
3.1 Installation

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.

Installing the application will consider all the necessary setup for installing an application.

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 the process. 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.

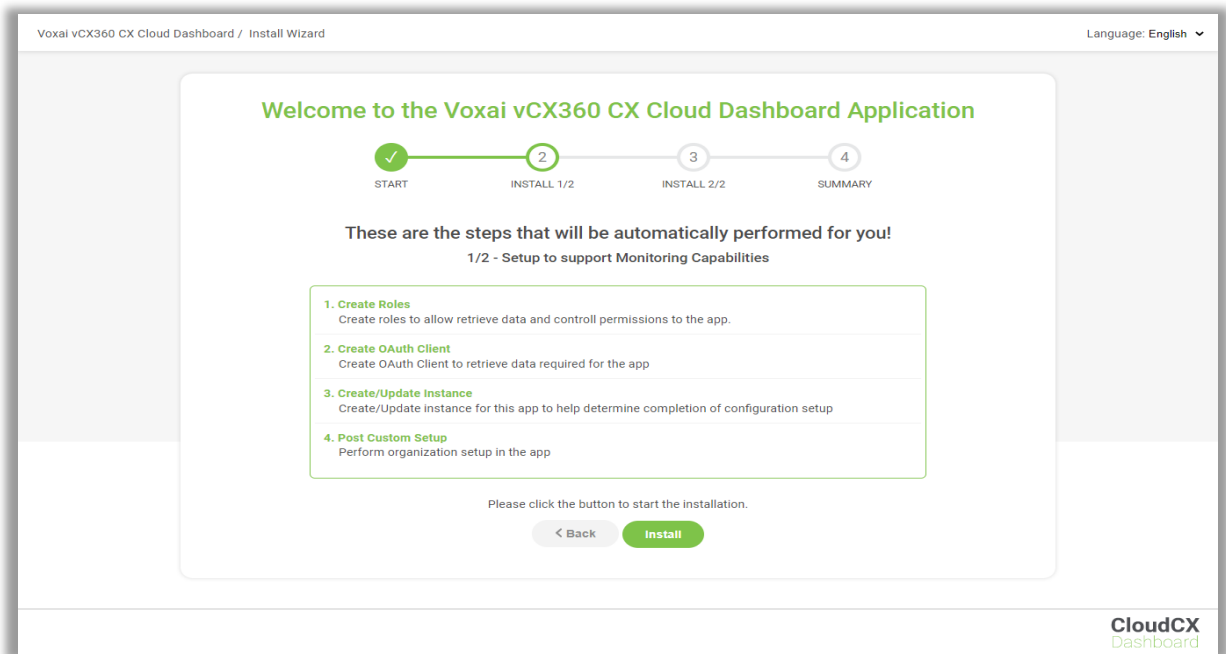
Below are the list permissions that are assigned to the new role that is created:

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


- ✚ 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.

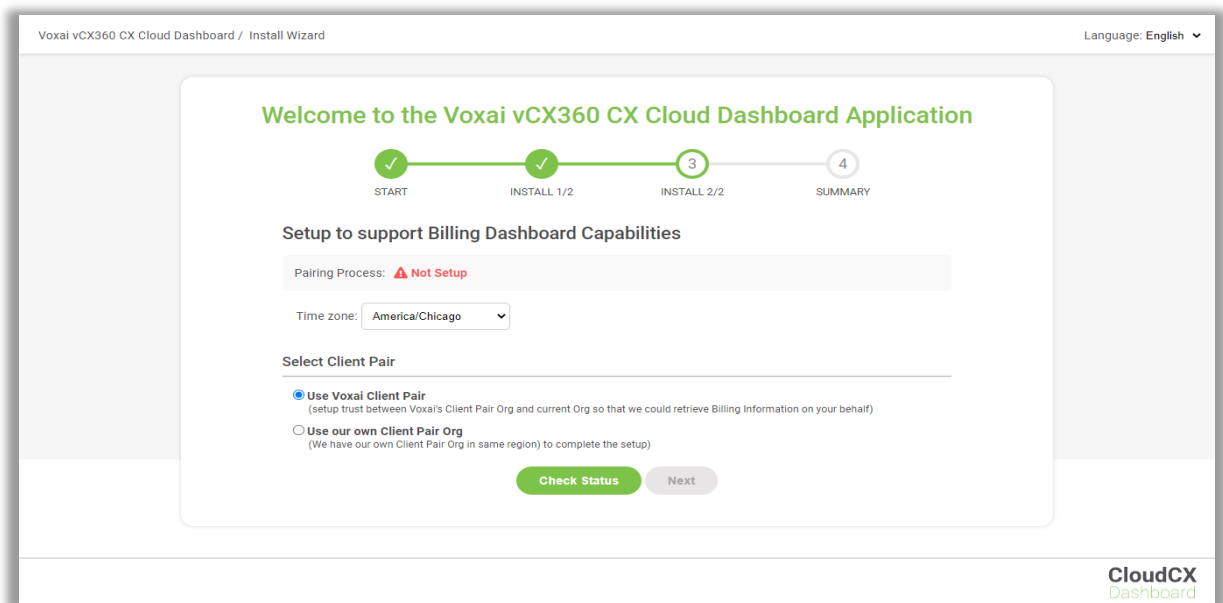
Note: When the user prefers to pair with the own client, then the organization setup is to be completed using the Config Assist wizard.

For more information on organizations refer to the following link:

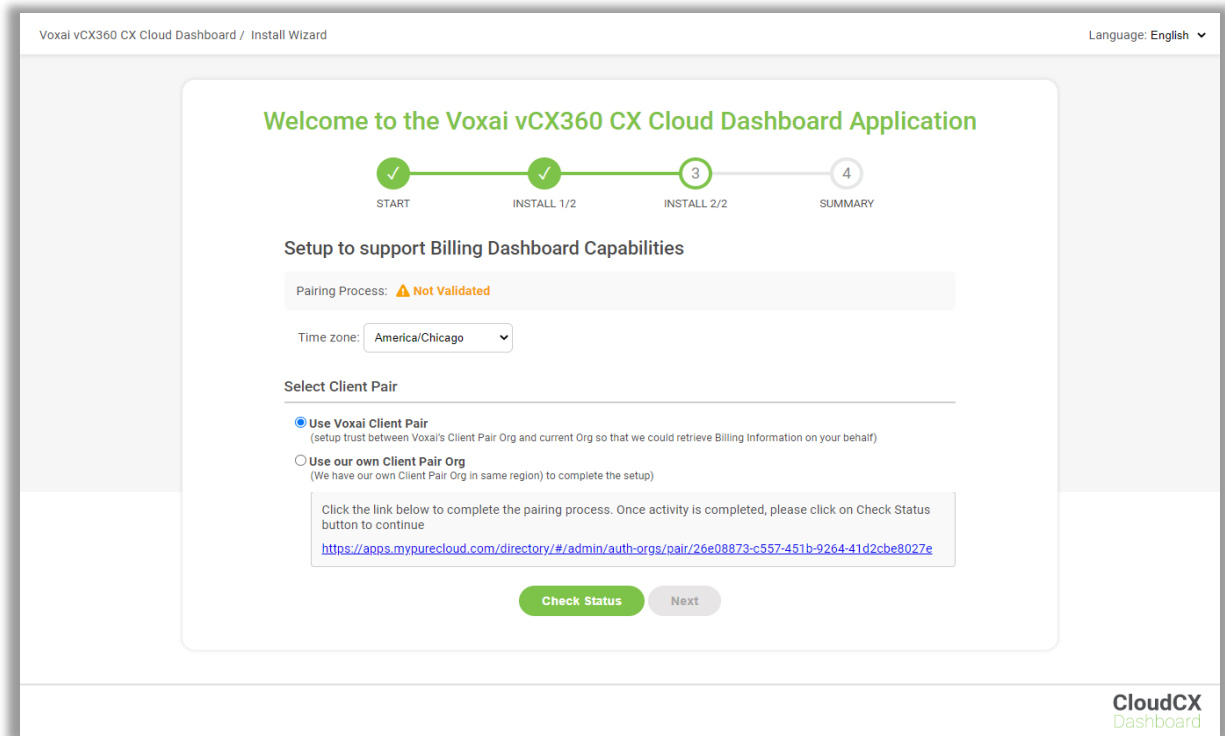
<https://help.mypurecloud.com/articles/about-authorized-organizations>

For help reach out to our mailbox:

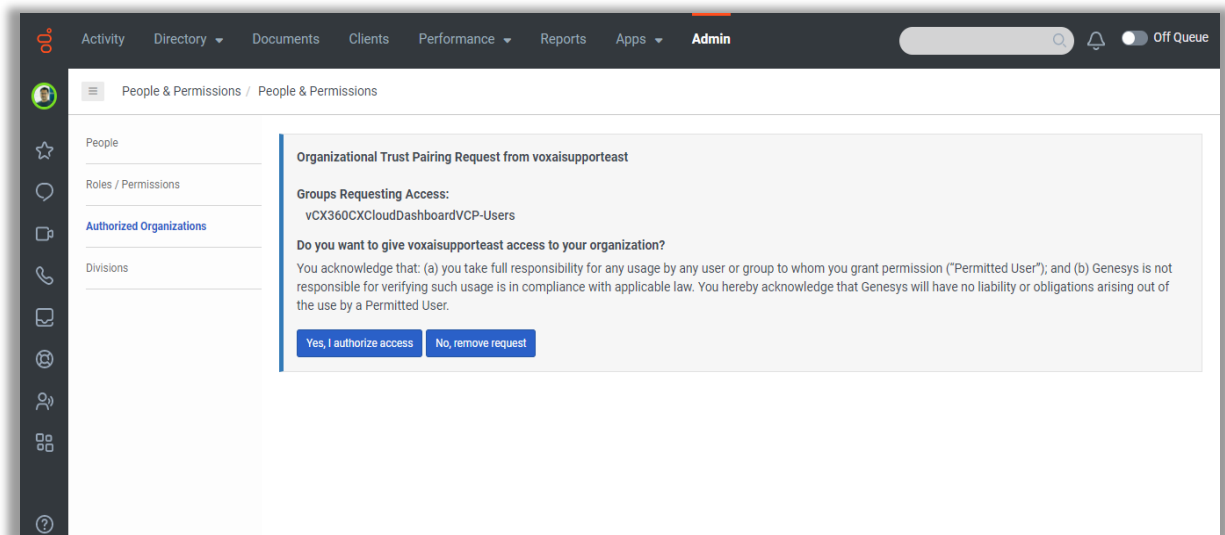
Select time zone and the Client organization for pairing, which allows the application to retrieve the billing information. And click on **Check Status** button.



4. In the above step, if **Use Voxai Client Pair** is selected then a link is generated in the backend and displayed on the screen. Click on the link.



5. As the link is clicked, the user is redirected to the admin page of Genesys platform. Click on “**Yes, I authorize access**” to accept the pairing request which is from Voxai organization. Shown below is an example Voxai organization: voxaisupporteast



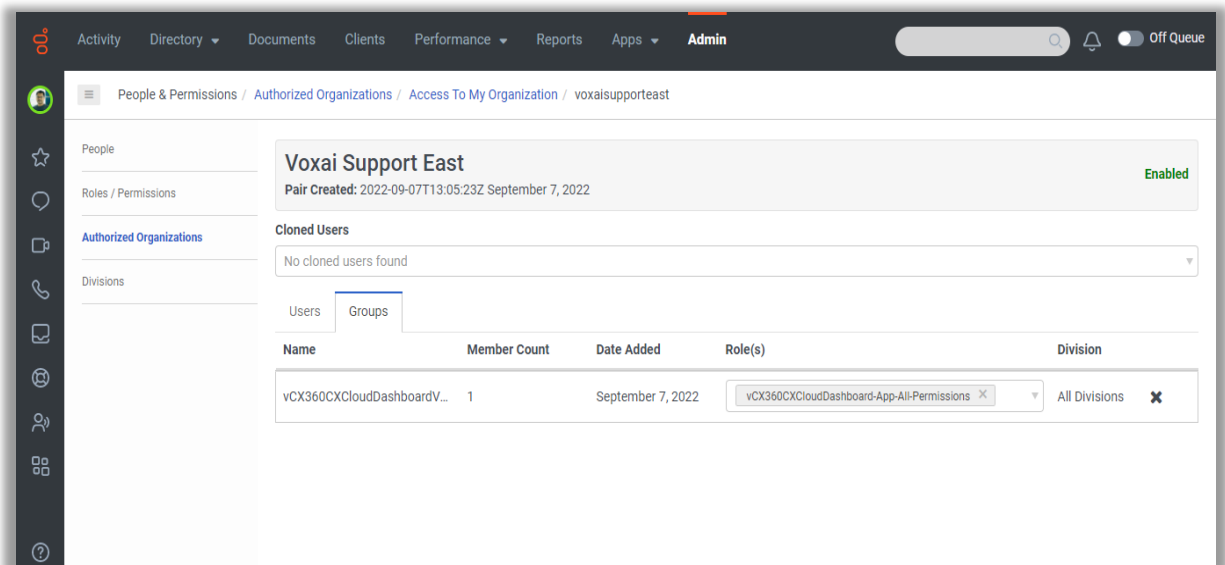
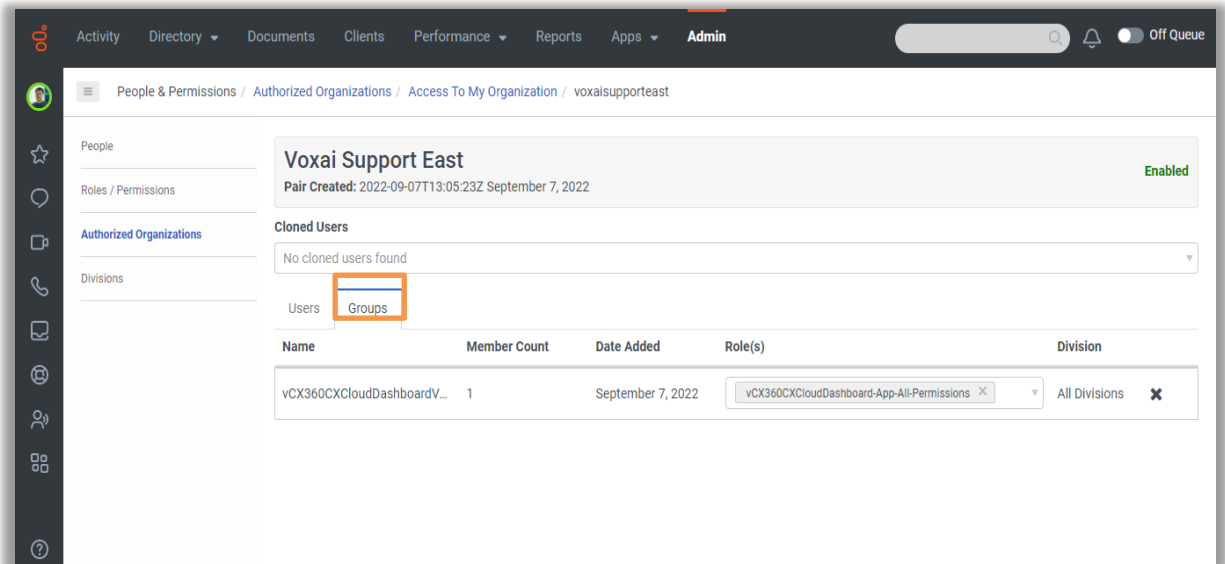
For more information refer to the following link:

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

- 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.

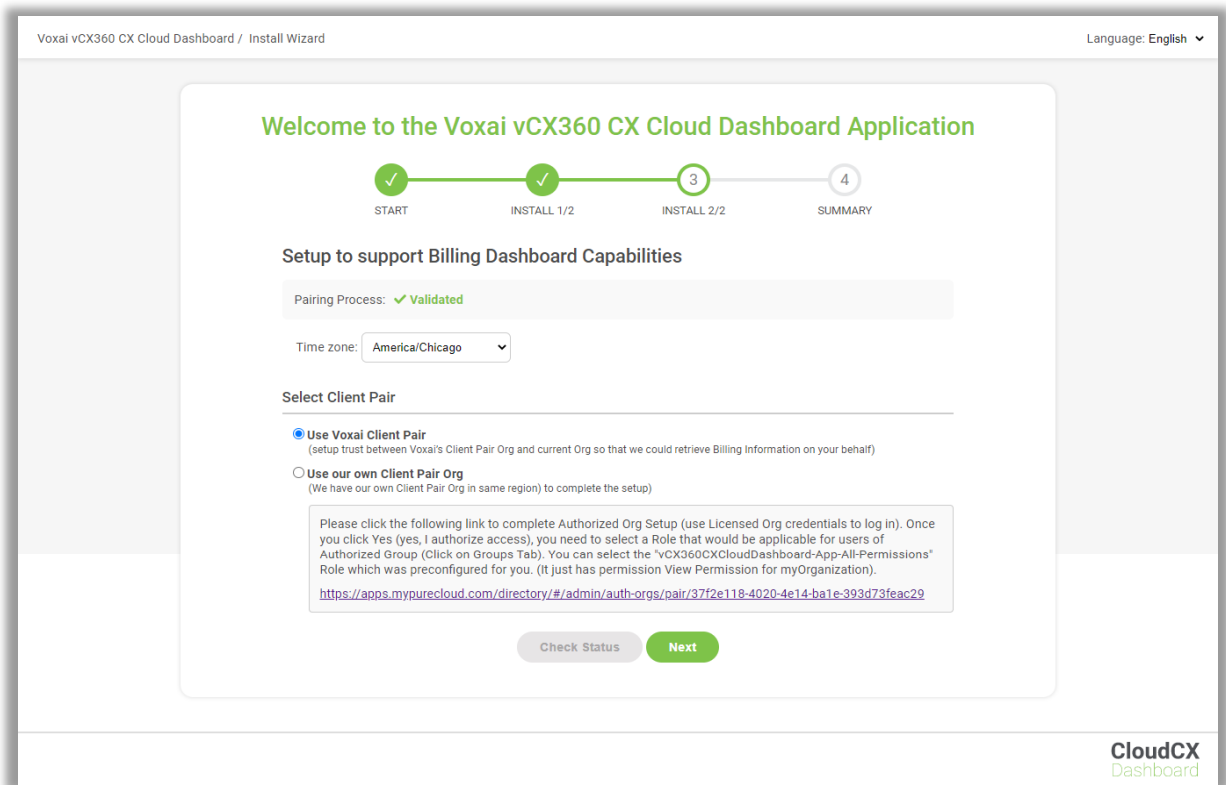
Below is the screen of the same:



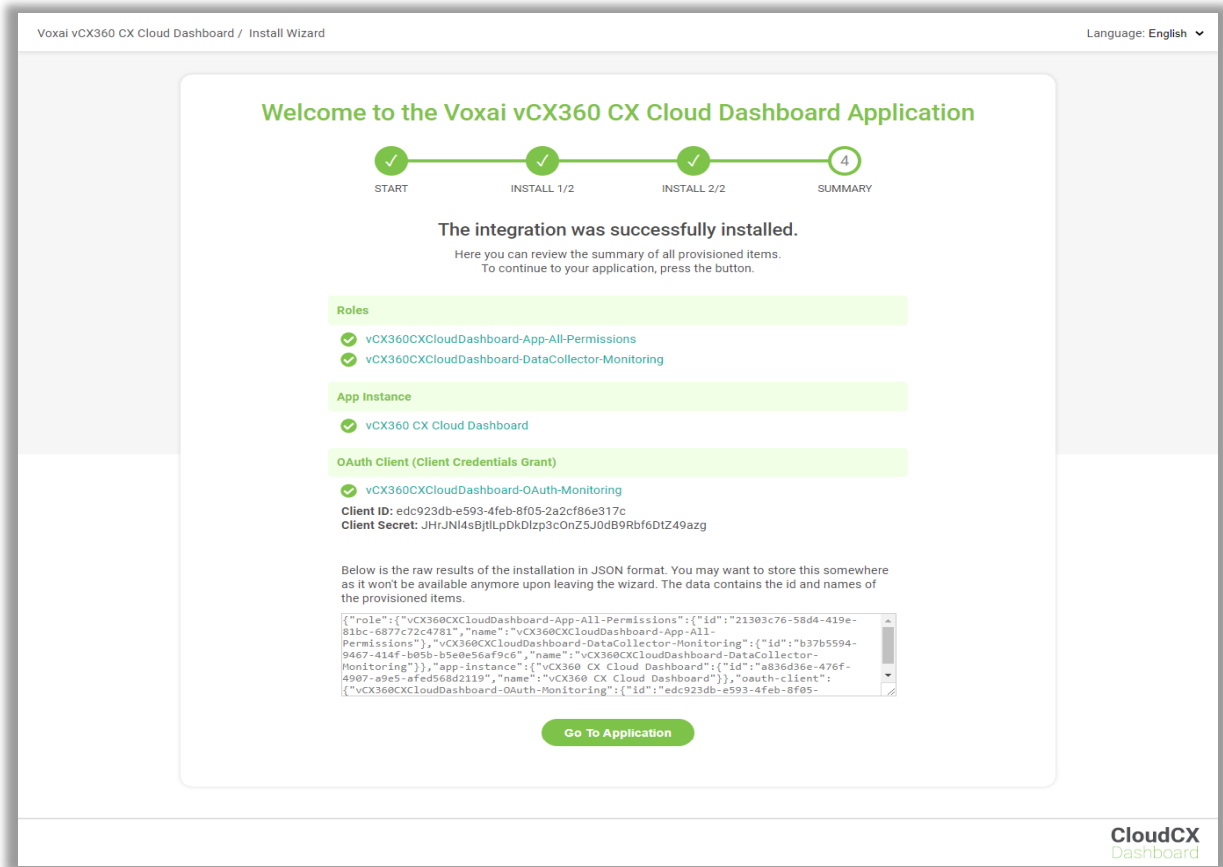
Note: The role mentioned in the above screen is a preconfigured one, which has only permissions for the vCX360 CX Cloud Dashboard application (Integration: vcx360cxclouddashboard:view).

Considering the application security, this is the only permission available.

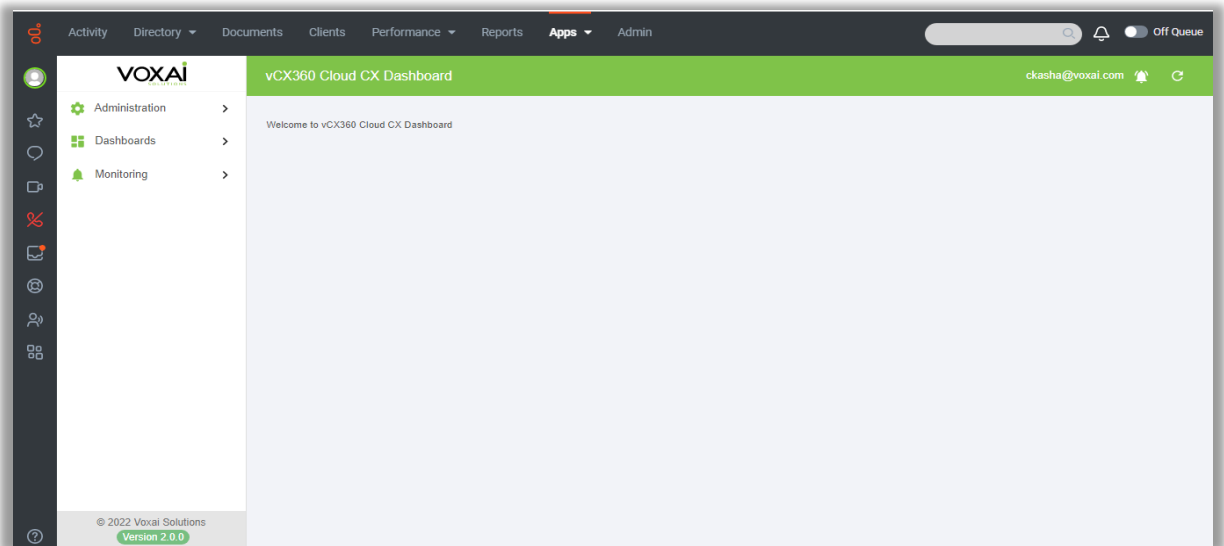
- Now go back to the application installation page. As the pairing process is successfully done the status displayed for the field **Pairing Process** is updated as Validated. Now click on **Next** button.



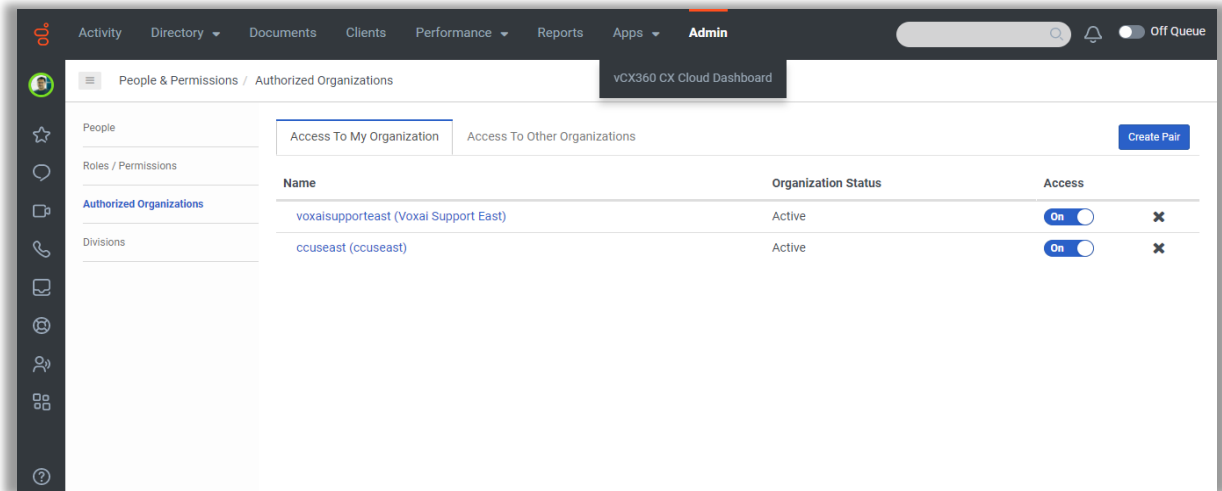
- Verify the details mentioned as application is successfully integrated onto Genesys platform as shown below. Click on **Go to Application** button.



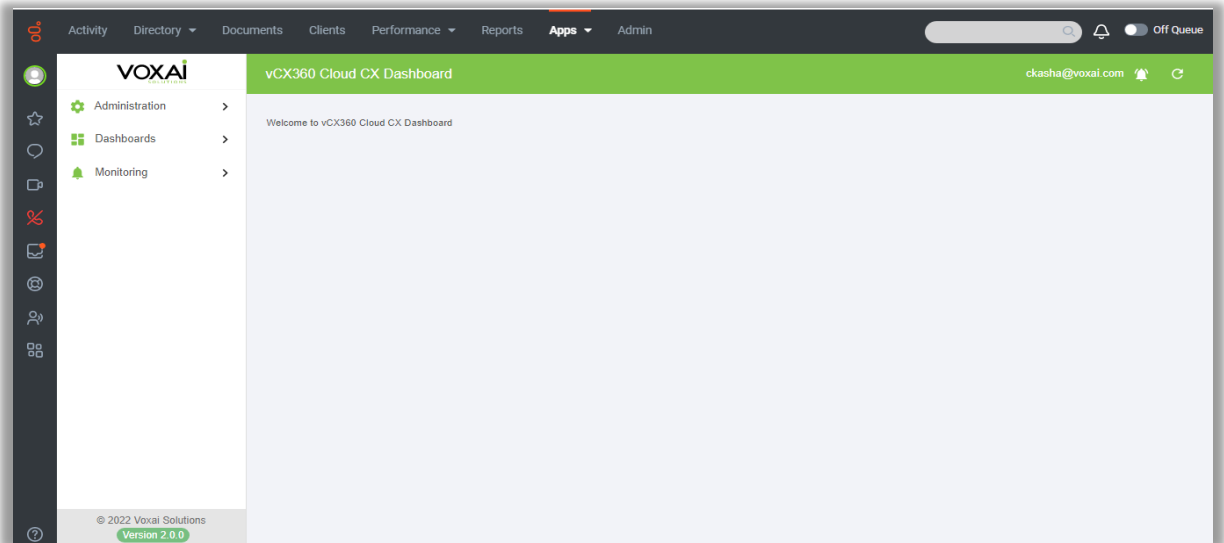
9. The user is auto logged in to the application, as shown in the below screen. If the application is not loaded as expected, then perform a hard refresh by pressing Ctrl+R.



10. After the installation is successful, user will be redirected to the Genesys Cloud home page with the application added under the **Apps** section as shown below.



11. When the user clicks on the application under Apps section, then the application is loaded as shown in the below screen.



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

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