

1.- Platform Foundation

- [Architectural Build Order](#)
- [Avaya-to-Genesys Cloud Reference Guide](#)
- [Locations & Floor Plans](#)
- [Licensing & Editions](#)

Architectural Build Order

This page is the master sequence for building a Genesys Cloud organization from scratch. Each item links to a dedicated reference page in this book. Follow this order — some objects cannot be moved between divisions after creation, and later steps depend on earlier ones being in place.

Phase 1: Global Foundation — The "Containers"

“ Define the logical and physical structure of the organization before adding any people or telephony.

Step	Object	Why It Comes First
1	Divisions	Logical partitions for your org (e.g., Monterrey Support, U.S. Sales). Some objects cannot be moved between divisions after creation.
2	Roles	Review out-of-the-box roles. Copy and customize as needed (e.g., SBC Admin, Read-Only Supervisor).
3	Locations	Define physical street addresses. Required anchor for Emergency (E911) routing.

Phase 2: Infrastructure — The "Pipes"

“ Connect the telephony infrastructure to the org structure you just created.

Step	Object	Why It Comes Here
4	Sites	Create a Site and link it to a Location from Phase 1.
5	Edges & Trunks	For BYOC: configure the SIP trunk to your Oracle / AudioCodes SBC. Requires a Site.
6	Phone Management	Create Base Settings, then individual WebRTC or SIP phone profiles. Requires a Site and Trunk.

Phase 3: People & Organization — The "Agents"

“ With infrastructure in place, bring in the staff.

Step	Object	Notes
7	Users	Create profiles via Manual entry, CSV import, or SCIM. Assign each user a Division, a Phone, and Roles. Users must have at minimum the Employee and User roles to take calls.
8	Groups	Create General Groups for internal communication. Create Skill Expression Groups for automated expert routing.
9	Work Teams	Group agents under their specific Supervisors for performance tracking and reporting.

Phase 4: Contact Center Logic — The "Routing"

Configure the ACD logic — this is where call routing decisions are defined.

Step	Object	Notes
10	ACD Skills	Define languages and technical skills (e.g., VoIP, SIP, Spanish). Required before queue assignment.
11	Queues	Create ACD Queues and assign Users and Skills. Requires Skills and Users from previous phases.
12	Architect Flows	Build the IVR logic. This is where routing decisions are defined — e.g., "If the caller presses 1, send to the Monterrey Support Queue." Requires Queues to exist first.

Reference Pages

Each item in this build order has a dedicated reference page in this book:

Phase	Reference Page
Phase 1	Organization Settings · Divisions · Roles & Permissions · Locations
Phase 2	Telephony & Trunk Management · Sites · Phone Management
Phase 3	User Profile Management · Group & Directory Management · Work Teams
Phase 4	Queue & Routing Management · ACD Skills · Architect & Call Flows

*Pages marked with * indicate items with direct dependency on previous steps — do not skip order.*

Avaya-to-Genesys Cloud Reference Guide

Audience: Telecom engineers and administrators migrating from Avaya (Aura, CM, Elite) or Aspect environments **Purpose:** Concept translation, mental model alignment, and key architectural differences

Concept Translation Table

Avaya / Aspect Concept	Genesys Cloud Equivalent	Key Difference
VDN / Vector	Architect Flow	Architect is drag-and-drop, visual, and integrates real-time Data Actions (API calls) far more easily than Vectors. No proprietary scripting language required.
Hunt Group / Skill Group	Queue	Genesys Queues handle all routing logic. ACD Skills are assigned to agents (users) to determine eligibility, not to the queue directly.
BCMS / CMS / IQ	Performance Views	Reporting is real-time, browser-based, and built-in. No separate thick-client reporting software, no ODBC connectors, no CMS server.
Stations (96xx / 16xx / J-series)	WebRTC / SIP Phone	Genesys primarily uses WebRTC — the browser IS the phone. Physical SIP desk phones are supported but optional. No station administration required for WebRTC agents.
SBC (Session Border Controller)	Edge / BYOC	Genesys Edges perform many SBC-like functions natively. You can still use your existing Oracle, AudioCodes, or Ribbon SBC via BYOC Cloud or BYOC Premises.
Class of Restriction (COR)	Roles + Divisions	COR-style access control is handled through RBAC (Roles & Permissions) scoped by Divisions. More granular and auditable than COR.

Avaya / Aspect Concept	Genesys Cloud Equivalent	Key Difference
Announcements / VAI	Architect Audio Prompts	Prompts are managed in Architect as TTS or uploaded audio files. No separate announcement board hardware.
ECH / UII (User-to-User Info)	Data Actions / Attributes	Interaction attributes and data passing between flows is done via Data Actions (API calls) or flow variables — not UII headers.
AES / CTI Link	Native API / Data Actions	Genesys has no separate CTI middleware layer. Screen pops, CRM integrations, and real-time data are handled directly via the Genesys Cloud API or built-in integrations.
Skill / Expert Agent Selection	ACD Skills + Routing Methods	Same concept — agents have skill proficiency levels (1-5). Queue routing uses Best Available, Most Idle, or Predictive routing to match.
VoIP Media Gateway	Edge (Cloud or On-Prem)	The Genesys Edge handles media, SIP signaling, and call recording. It can be a physical appliance, a virtual machine on AWS, or a Genesys-managed cloud Edge.
ARS / AAR Routing	Architect Flow + Trunks	Digit analysis and alternate routing are handled in Architect flows, not dial plan tables. Much more flexible — conditional logic, real-time data lookups.
Avaya Aura Conferencing	Genesys Cloud Collaborate	Internal conferencing, group chat, and video are handled natively in Genesys Cloud without a separate conferencing platform.

Architectural Mental Model Shift

From Avaya's Server-Centric Model → Genesys Cloud's API-First Model

Avaya Aura architecture thinking:

PBX (CM) → AES → CTI App → Reporting Server → Admin Client

Genesys Cloud architecture thinking:

Everything is an API call → Browser UI → Cloud-native

There is no "server room" equivalent in Genesys Cloud for most functions. Configuration, routing logic, reporting, and administration are all browser-based and API-driven.

Infrastructure Hierarchy (Telecom Engineer View)

Genesys Concept	Telecom Equivalent	Purpose
Location	Physical building / site address	Defines the physical address used for emergency services (ELIN/911)
Site	PBX logical partition / tenant	Groups Edges and Phones. Usually one Site = one Location.
Edge	Media Gateway + SBC hybrid	Handles audio media, SIP signaling, DTMF, and call recording
Trunk	SIP Trunk / T1/PRI circuit	External connection to the PSTN, SBC, or legacy PBX

Location (Address / ELIN)

└ Site (Logical Hub)

└ Edge (Media + SIP Engine)

└ Trunk (PSTN / SBC / PBX connection)

BYOC Options — For Orgs Keeping Their SBC

Genesys offers two BYOC (Bring Your Own Carrier) models for orgs with existing SBC infrastructure:

Model	What It Means
BYOC Cloud	Your SBC connects to Genesys Cloud via the internet. Genesys manages the Edge in the cloud.

Model	What It Means
BYOC Premises	Your SBC connects to a Genesys Edge device on your premises. More control, more hardware.

Compatible SBCs include Oracle (ACME Packet), AudioCodes, Ribbon (formerly GENBAND/SONUS), and others.

Routing Logic Translation

Avaya Vector → Genesys Architect Flow

Vector Step	Architect Equivalent
goto step if...	Logical / Decision action
queue to skill	Transfer to ACD → Queue
busy / disconnect	Disconnect action
collect digits	Collect Input action
announcement	Play Audio action
goto vector	Call Flow action (invoke sub-flow)
adjunct routing	Data Action (API call to external system)

Key Architect Advantage Over Vectors

- Visual drag-and-drop — no scripting syntax to memorize
- Real-time API calls (Data Actions) built-in — no AES/CTI middleware needed
- Version control with Check In/Check Out
- Debug mode with call simulation
- Execution History for post-call flow tracing

Agent Experience Translation

Avaya Agent Concept	Genesys Cloud Equivalent
Agent logged into a station	Agent logged into browser (WebRTC) or registered SIP phone

Avaya Agent Concept	Genesys Cloud Equivalent
After Call Work (ACW)	After Call Work — configurable per queue (optional, mandatory, timeout)
Available / Busy / AUX	On Queue / Busy / Away / Break / etc. (admin-configurable statuses)
Skill assignment via CMS	ACD Skills assigned via Admin → People → ACD Skills tab (proficiency 1-5)
Supervisor monitoring (silent)	Supervisor joins interaction as silent monitor via Performance Views

Licensing Model Translation

Avaya Model	Genesys Cloud Equivalent
Port-based licensing	User-based licensing (per named user, per month)
Separate reporting license	Included in CX license tiers
Separate WFM license	WEM Add-on licenses (CX1 WEM Add-on I/II, or CX2/3 bundled)
One-time capex	SaaS subscription (OpEx model)

Study Scenario

Scenario: A new manager joins the Monterrey Support team. They need to:

1. Listen to their team's calls for coaching
2. NOT be able to see calls from the U.S. Sales team
3. Be able to create new agent screen pop scripts for their team

Genesys Solution:

- Assign the **Supervisor** role (+ User role) — enables silent monitoring and performance views
- Scope their role to the **Monterrey Support Division only** — blocks visibility into the U.S. Sales division
- Assign **Script Designer** permissions or the appropriate **Quality/Admin role** for script creation — scoped to their division

This mirrors a COR + skill group restriction in Avaya, but is implemented through Roles + Divisions in Genesys.

See Also

- **Architectural Build Order** — the recommended sequence for building a Genesys Cloud environment
- **Telephony & Trunk Management** — BYOC Cloud and BYOC Premises configuration
- **Architect Overview** — Architect flow building vs. Vector scripting
- **Roles & Permissions** — RBAC model replacing COR-style access
- **Divisions & Access Control** — scoping access by business unit

Locations & Floor Plans

Navigation: Admin → Directory → Locations

What Are Locations?

Locations represent **physical addresses** in Genesys Cloud. They serve two distinct purposes:

1. **Emergency Services (911/112)** — Locations are the source of address data sent to emergency dispatchers when a user dials an emergency number. This is the most critical function.
 2. **User Directory** — Locations appear on user profiles and are searchable in the org directory, helping colleagues find where someone is physically based.
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Infrastructure Relationship

Locations connect the physical world to Genesys telephony:

Location (Physical Address)

└─ Site (Logical Telephony Hub)

└─ Edge (Telephony Engine — handles audio, SIP, recording)

└─ Trunk (External connection to PSTN / SBC / PBX)

“ ⚠ A **Site must be linked to a Location** for emergency (911) routing to work. Without this link, Genesys cannot send the correct address to emergency dispatchers.

Creating a Location

1. Admin → Directory → **Locations**

2. Click **Add Location**
3. Fill in:

Field	Notes
Name	Descriptive name (e.g., "Monterrey HQ", "Dallas Office Floor 3")
Site Contact	A user in your org who is the primary contact for this building
Address	Physical street address — used for emergency services
Location Image	Optional building photo — JPEG, PNG, or GIF, max 10MB

4. Click **Save**

“ ⚠ **Do not put floor numbers in the main address field.** Use the dedicated **Floors** section instead. Mixing floors into the address breaks emergency routing accuracy.

Emergency Services Configuration

This is the highest-priority section for both production deployments and the admin exam.

In the **Location Details** tab after saving the location:

1. Toggle **Make this location available for use on sites** → **On**
2. Enter the **Emergency Number** — the callback number sent to emergency services
3. Choose the **ANI (Automatic Number Identification) logic**:

ANI Option	Behaviour
Use as the ANI only if the phone or user doesn't have one	Fallback — uses the location's emergency number only when the individual user has no assigned DID
Always use as the ANI	Override — forces this location's number to be sent to dispatchers regardless of the user's personal extension

4. Click **Save**

Why ANI Matters

In multi-line environments (large offices, contact centers), emergency dispatchers need the building address — not a random agent's personal extension. The ANI setting ensures the dispatcher receives a number that maps to the correct physical location so emergency responders go to the right place.

Genesys uses **ELIN (Emergency Location Identification Number)** for this. When a user at a Site dials 911, Genesys looks up the Location linked to that Site and sends the configured ELIN/ANI to the dispatcher.

Adding Floors & Floor Plans

Best practice: Add multiple floors to a single Location rather than creating a separate Location per floor.

To add a floor:

1. In the location record, scroll to the **Floors** section
2. Click **Add Floor**
3. Click **Upload a new floor plan** and upload an image of the floor layout
4. Click **Save**

Supported formats: JPEG, PNG, GIF — **max 10MB per image**

User Pins

Once a floor plan is uploaded, **users can drop a pin on the map** from their own profile to mark their exact desk location. This is not admin-controlled — it is self-service per user.

Why floor plans matter beyond aesthetics:

- In an emergency, supervisors can see exactly where each agent is sitting
 - Speeds up emergency responder navigation in large facilities
 - Helps remote managers understand physical seating arrangements
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Location Visibility in the Directory

When a location is assigned to a user's profile:

- It appears on their directory profile card

- It is searchable — colleagues can find people by location name
 - It displays the floor plan pin if the user has set one
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Quick Reference — Key Facts

Feature	Detail
Primary purpose	Emergency routing + user directory
Emergency standard	ELIN (Emergency Location Identification Number)
Site link required for 911	Yes — Site must reference the Location
Floor plan formats	JPEG, PNG, GIF
Floor plan max size	10MB
Floor best practice	Add floors to one Location — do not create a new Location per floor
ANI override option	"Always use as the ANI" — forces location number to dispatch
User pin	Self-service — users set their own pin on their profile

See Also

- **Architectural Build Order** — Locations are created in Phase 1 (Global Foundation) before Sites and Edges
- **Telephony & Trunk Management** — Sites, Edges, and Trunks that reference Locations
- **User Profile Management** — where the Location field appears on user profiles

Licensing & Editions

Study Notes

Topic	Description
Licensing Model	Subscription-based per-user licensing structure
Edition Types	Premium, Standard, and Partner editions available
Seat Management	Active user management and licensing enforcement
Compliance	License compliance monitoring and reporting
Trial Access	14-day free trial available for new organizations

Navigation

Admin → Organization Settings → Licensing & Editions OR Admin → Billing & Subscriptions → Licenses

Edition Overview

Premium Edition

- Full feature set including advanced analytics, workforce optimization, and contact center intelligence
- All modules and integrations available
- Best for enterprise organizations with complex requirements
- Price: Enterprise pricing model

Standard Edition

- Core contact center functionality
- Includes basic call routing, IVR, queuing, and reporting
- Suitable for mid-market organizations
- Reduced analytics and optimization features compared to Premium

Partner Edition

- Designed for partner organizations and resellers
- Limited feature set for specific use cases
- Support for multi-tenant environments

Study Notes - License Types

License Type	Description	Use Case
Agent	Full contact center user with all capabilities	Customer service representatives
Supervisor	Management and team oversight capabilities	Team leads and supervisors
Executive	Reporting and dashboard access	Management and executives
Workforce Optimization	Advanced scheduling and forecasting	Workforce planners
Customer Insights	Interaction analytics and quality management	Quality assurance teams

Implementation Guide

Step 1: Assess License Requirements

1. Determine number of concurrent agents needed
2. Identify required modules (voice, digital, analytics)
3. Evaluate feature requirements by department
4. Review integration needs

Step 2: Purchase Licenses

1. Contact Genesys sales for quote
2. Define license quantities per edition
3. Establish billing cycle (monthly/annual)
4. Set up payment method

Step 3: Activate & Manage Licenses

1. Log in to Admin section
2. Navigate to Organization Settings
3. Add users to appropriate license tiers
4. Assign modules and capabilities
5. Monitor license consumption

Step 4: Monitor & Optimize

1. Review monthly license usage reports
2. Adjust licenses based on demand
3. Reassign licenses to active users only
4. Track compliance status

How to Implement

Phase	Description
Planning	Audit current user needs and forecast growth
Procurement	Work with sales to select editions and add-ons
Deployment	Activate licenses and assign to users
Management	Monitor usage and adjust as needed
Optimization	Review quarterly and optimize allocations

Licensing Architecture Diagram

Organization



Subscription (Edition)

└ Premium

└ Standard

└ Partner

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License Pool

└ Agent Licenses

└ Supervisor Licenses

└ Executive Licenses

└ Add-on Modules

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User Assignment

└ Active Users

└ Inactive Users

└ License Status

License Features by Edition

Premium Edition Features

Core Platform

└ Voice (Inbound/Outbound)

└ Digital Channels (Chat, Email, Social)

└ Contact Center Intelligence

└ Advanced Routing

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Analytics & Reporting

└ Real-time Dashboards

└ Historical Reports

└ Custom Reports

└ Workforce Analytics

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Optimization

└ Workforce Management

└ Quality Management

└ Compliance Recording

└ Performance Analytics



Integrations

- |— CRM Integrations
- |— Third-party APIs
- |— Custom Integrations
- └— Marketplace Apps

Standard Edition Features

Core Platform

- |— Voice (Inbound/Outbound)
- |— Digital Channels (Chat, Email)
- |— Basic Routing
- └— IVR / Menu Systems



Analytics & Reporting

- |— Basic Dashboards
- |— Historical Reports
- └— Queue Reports



Limited Modules

- |— Basic Quality Management
- |— Recording
- └— Basic Integrations

User License Assignments

Agent License (Most Common)

- Seats in queues
- Handle inbound/outbound contacts
- Access to omnichannel interactions
- Limited reporting access
- Cost: Standard per-seat cost

Supervisor License

- Team management capabilities
- Agent monitoring
- Performance reporting
- Coaching tools
- Cost: Premium over agent licenses

Executive License

- Dashboard and analytics access
 - No agent seat required
 - Read-only access to systems
 - Strategic reporting
 - Cost: Lower than agent licenses
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Real Flow Scenario: New User License Assignment

New Hire Onboarding



Determine Role (Agent/Supervisor/Executive)



Check Available Licenses



Assign License in Admin



Activate User Account



Grant Appropriate Permissions



User Can Access System

Usage Scenarios

Scenario	Solution
Company growing from 50 to 100 agents	Purchase additional Agent licenses and upgrade to Premium
Need advanced analytics	Add-on Workforce Optimization module
Support for multiple customer channels	Include digital channel add-ons (Chat, Email, Social)
Multi-site organization	Centralized licensing with site-based allocation
Seasonal staffing	Use grace period for temporary license overages

License Management Checklist

Task	Frequency	Owner
Review license utilization	Monthly	IT/Admin
Update user counts	As needed	HR/Admin
Check compliance status	Quarterly	Compliance
Audit inactive users	Monthly	Admin
Plan for growth	Quarterly	Management
Review billing	Monthly	Finance

Best Practices

License Optimization

- **Deactivate inactive users** - Remove licenses from users not actively using the system
- **Right-size editions** - Don't over-provision when Standard meets requirements
- **Plan for growth** - Purchase licenses with 10-15% buffer for growth
- **Monitor grace periods** - Know overage policies during scaling

User Management

- **Clean up regularly** - Remove licenses from terminated employees immediately
- **Use role-based assignments** - Assign appropriate license tier to roles
- **Track license inventory** - Maintain spreadsheet of assignments
- **Document changes** - Keep audit trail of license modifications

Compliance & Reporting

- **Enable audit logs** - Track all license changes
- **Monthly reviews** - Generate usage reports
- **Forecast needs** - Plan for future requirements
- **Coordinate with finance** - Align licensing budget with subscriptions

Common Issues & Resolutions

Issue	Cause	Resolution
Users cannot log in	License limit reached	Purchase additional licenses or deactivate unused accounts
Missing features in user account	Wrong edition assigned	Upgrade user to Premium edition
Excessive billing costs	Inactive users still licensed	Implement user deactivation process
License mismatch	No license assignment	Assign appropriate license tier to user
Add-on unavailable	Not included in edition	Purchase add-on module or upgrade edition

Naming Convention for License Groups

<Department>_<Role>_LicenseGroup

Examples:

- Support_Agent_LicenseGroup
- Sales_Supervisor_LicenseGroup
- Executive_Analytics_LicenseGroup
- Workforce_Optimization_LicenseGroup

Add-on Modules & Pricing

Module	Description	Best For
Workforce Optimization	Advanced scheduling, forecasting, analytics	Large contact centers
Quality Management	Call recording, evaluation, coaching	Quality assurance teams
Customer Insights	AI-powered interaction analytics	Compliance-focused orgs
Advanced Analytics	Custom dashboards and reporting	Data-driven organizations
Chat & Messaging	Digital channel support	Omnichannel centers
Social Media	Social channel integration	Customer engagement teams

Licensing Compliance Monitoring

Key Metrics to Track

- **Active licenses vs. purchased** - Ensure no overages
- **License utilization rate** - Target 80-95% utilization
- **Cost per seat** - Monitor per-user cost trends
- **Inactive user percentage** - Flag unused licenses
- **Module adoption** - Track add-on usage and ROI

Compliance Reports Available

- License status report
 - User assignment report
 - Feature utilization report
 - Grace period usage
 - Billing reconciliation report
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License Allocation by Department

Example

Organization: TechCorp (500 users)

Premium Edition: 400 seats

- ├ Support Department (150 agents)
- ├ Sales Department (120 agents)
- ├ Back-office (80 supervisors/executives)
- └ Operations (50 agents)

Standard Edition: 100 seats

- ├ Part-time support (60 agents)
- └ Contractors (40 agents)

Add-ons by Department:

- ├ Workforce Optimization: Support + Sales (270 users)
- ├ Quality Management: Support + Sales QA (20 users)
- └ Advanced Analytics: Management (15 users)

Trial Period & Onboarding

14-Day Free Trial

- Full access to selected features
- Up to 50 concurrent users
- All core modules included
- No credit card required
- Automatic conversion to paid plan or expiration

Trial Setup Steps

1. Visit Genesys Cloud website
2. Click "Start Free Trial"

3. Enter organization details
4. Verify email
5. Set up initial users
6. Explore features
7. Convert to paid plan before day 14

Interview Cheat Sheet

Question	Answer
What are the main Genesys PureCloud editions?	Premium, Standard, and Partner
Where do you manage licenses?	Admin → Organization Settings → Licensing & Editions
What is an Agent license used for?	Full contact center functionality for customer service reps
How do you handle license overages?	Grace period available; must purchase additional licenses
What should you do with inactive users?	Deactivate them to free up licenses for active users
Can you mix editions in one organization?	Yes, different users can have different edition licenses
What's the most cost-effective way to grow?	Right-size editions, avoid over-provisioning
How often should you review licenses?	Monthly for usage, Quarterly for compliance
What's the difference between Agent and Supervisor licenses?	Supervisor has team management, analytics, and coaching capabilities
What add-ons provide the most ROI?	Workforce Optimization and Quality Management for large centers

Key Takeaways

- **Subscription Model** - Genesys PureCloud uses subscription-based licensing per user
 - **Three Main Editions** - Premium (full features), Standard (core features), Partner (limited)
 - **License Types Vary** - Agent, Supervisor, Executive with different capabilities and costs
 - **Active Management Required** - Deactivate unused users to control costs
 - **Compliance Tracking** - Monitor usage and ensure license compliance monthly
 - **Add-on Flexibility** - Enhance core editions with specialized modules as needed
 - **Right-sizing Critical** - Match edition to organizational needs to optimize ROI
 - **Grace Periods Exist** - Temporary overages allowed but should be resolved quickly
 - **Audit Trail Important** - Track all license changes for compliance
 - **Forecast Growth** - Plan ahead for scaling to avoid service interruptions
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Additional Resources

Official Documentation Links

- Genesys Cloud Licensing Guide: <https://help.genesys.com/genesyscloud/current/en-us/LicensingEditions.html>
- Admin Guide: <https://help.genesys.com/genesyscloud/current/en-us/Admin/Licensing.html>
- Billing & Subscriptions: <https://help.genesys.com/genesyscloud/current/en-us/Billing.html>

Support Contacts

- Genesys Sales: sales@genesys.com
 - Genesys Support: <https://support.genesys.com>
 - Community Forums: <https://community.genesys.com>
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