

# 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

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# 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

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# 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

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## 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

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## 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

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# 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

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# 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

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## 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

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# 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

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## 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](mailto:sales@genesys.com)
  - Genesys Support: <https://support.genesys.com>
  - Community Forums: <https://community.genesys.com>
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