

The logo graphic consists of three overlapping, rounded, arrow-like shapes pointing to the right. The top shape is a light teal color, the middle shape is a medium teal color, and the bottom shape is a dark teal color. The word "GLIDER" is written in a bold, dark blue, sans-serif font, with the letters partially overlapping the shapes.

GLIDER

Genesys Cloud App Foundry
Glider Agent Assisted Integration Manual

Version 2022.09



Contents

Contents	2
Overview	3
Admin	4
Prerequisites	4
Installation	4
Assign Agents	5
Agents	6
Create Payment Request	6
Monitor Payment Request status	8
View History	10



Overview

The Glider Assisted Payments integration with Genesys Cloud App Foundry provides a simple and quick way to connect your Glider account with your Genesys account and allows Agents to generate payment requests while on a call or live chat.

This document is divided in 2 main sections and describes how to install and configure the integration (Admin) and how to use it (Agents).



Admin

Prerequisites

Before connecting your Glider account with Genesys Cloud, ensure that you meet the following prerequisites:

- You have a Genesys Cloud account and credentials
- You have an API KEY for your Glider account, provided by Glider

Installation

To install Glider Assisted Payments integration in your Genesys Account please complete the following:

1. Login into your Genesys Cloud Account
2. Go to Admin > Integration > AppFoundry
3. Search for "**Glider Assisted Payments**"
4. Click on Install Now and follow the instructions in the wizard
5. Enter the provided Glider API Key during the installation
6. Hard refresh your page and look for the Assisted Payments item under your apps menu

If you encounter any issue during installation please reach out to support@gliderpay.com and specify your glider customer identifier.



Assign Agents

To allow your Agents to use Glider Assisted Payments, you need to assign them to the newly created Genesys Group “**Glider Agents**”.

Please follow the instructions below to add your agents to the group:

1. Login into your Genesys Cloud account
2. Go to Admin > Directory > Groups
3. Find the group ‘Glider Agents’ and click on it
4. Click on edit on the top right
5. On the bottom of the page. A new prompt will appear that will allow you to add one or multiple agents
6. Press save when you have added all the agents to the group

Your Agents will now have access to Glider Assisted Payments Genesys Cloud Integration in the interaction bar



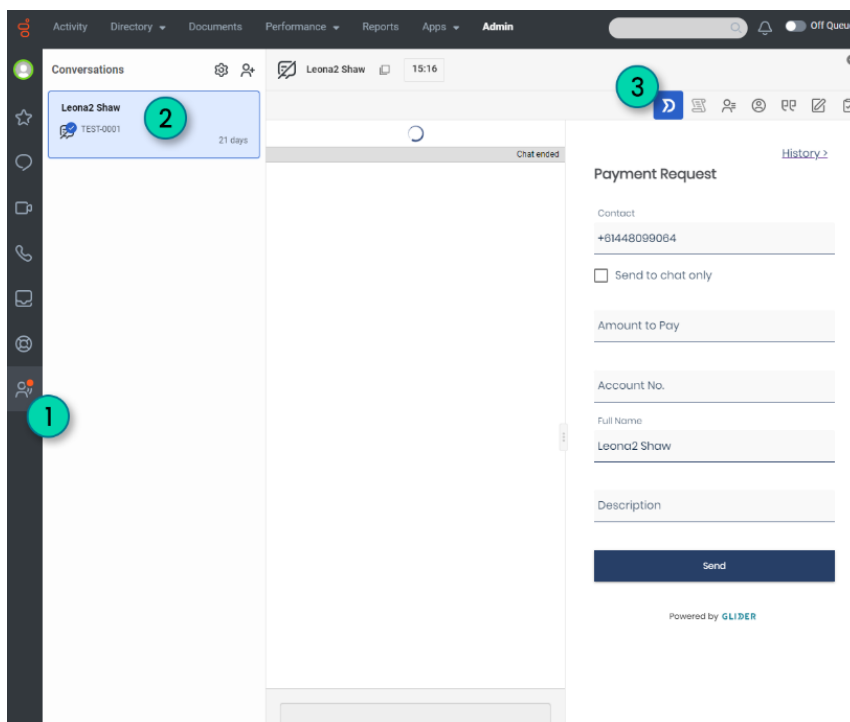
Agents

Please make sure you are logged in into your Genesys Cloud account with a user that belongs to the “Glider Agents” group before proceeding with the following steps.

Create Payment Request

Glider Assisted Payments allows an agent to send a Payment Request via sms, email or link while on a call or live chat with the customer and monitor the Payment Request status simultaneously.

1. While on a call, Agent clicks the Interaction menu
2. Agent selects the active conversation
3. Agent selects the Glider Assisted Payment integration on the top right menu





Glider Assisted Payment integration will automatically prefill all the available information (if any) such as mobile number, email address and full name.

The Agent can then manually fill Amount and Account Number plus any other optional field that has been configured in the main Glider account.

In order to specify which channel to use to reach the customer, the Agent has 3 different options:

A. SMS

To send an SMS to the customer containing the Payment Request link, the Agent must ensure that the 'Contact' field is populated with the customer's mobile number (including international prefix).

B. EMAIL

To send an Email containing the Payment Request linke, the Agent must ensure that the 'Contact' field is populated with the customer's email address.

C. LINK

(Option available only during live chat)

To send a link directly in the chat, the Agent selects the checkbox "Send to chat" only. Any value in the contact field will be ignored as it is not required.

Once all the fields have been filled Agent can simply press the SEND button to generate and send the Payment Request.



Monitor Payment Request status

Once a Payment Request gets generated and sent to the customer, Glider Assisted Payments will display to the Agent in real time the status of the request

Below is a summary of all possible statuses:

1. **SENT**

The Payment Request has been sent to the customer.



Request Status

Sent

2. **CLICKED**

The customer has received the notification and clicked on the link.

The customer is currently viewing the payment portal page.



Request Status

Clicked



3. **PAYMENT DECLINED**

The customer has submitted their payment method details but the payment gateway has declined the transaction.



Request Status

Payment Declined

4. **PAYMENT RECEIVED**

The customer has successfully completed the payment. Below the payment request status, the Agent can see all the details of the successful transaction including the amount paid and the receipt number (generated by the payment gateway)..



Request Status

Payment Received



View History

At any time, the Agent can click on the link on the top right “History”. This page will display all the Payment Requests sent by the Agent (the individual Agent, not the entire Genesys account). This list contains the basic information and status for the Payment Requests generated by the Agent during the last 7 days.