



Genesys Predictive Engagement Administrator's Guide

Custom sessions and custom events

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Limited Availability

Understand how to capture information about customer activity in your third-party system and present it to agents.

Related pages:

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Prerequisites

- Configure the following permissions in Genesys Cloud:
 - To see custom sessions and custom events, assign agents specific permissions.
- Deploy the Genesys Predictive Engagement tracking snippet.

Overview

With Genesys Predictive Engagement's RESTful Journey API, you can use custom sessions and custom events to track a customer's experience with your organization across a variety of third-party products and systems. A **custom session** represents a sequential set of related organization-specific events that occur in a third-party system, for a particular customer within a given period. These events are **custom events**.

Use the Session Library to configure how to present this activity to agents.

Benefits of custom events

1. Allow an agent to contextualize the nature of the query
2. Reduce agent stress in trying to look up multiple systems quickly
3. Reduce handling time
4. Increase single contact resolution rate
5. Allow for orchestration on custom events

Send a custom event to start a custom session

To start a custom session, send a custom event from any external system that can send programmable events in the form of HTTP requests into Genesys Cloud. To do it, an

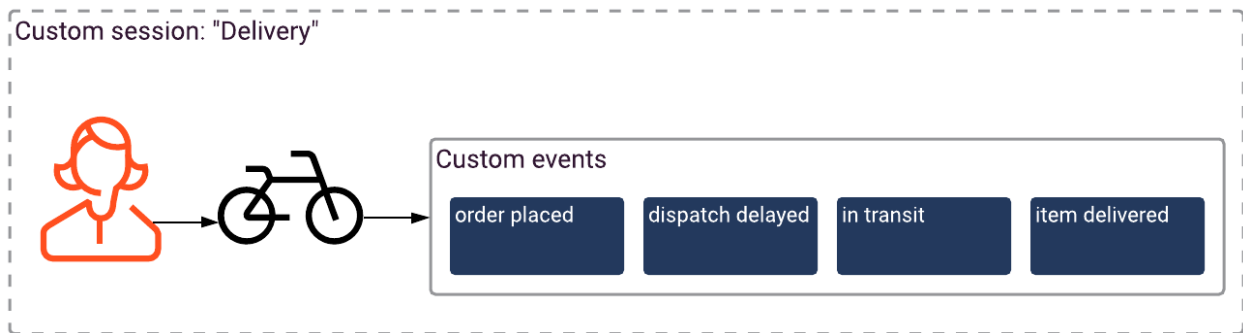
external system calls the Custom Events API. For more information about this API, see the Custom Events API in the Developer Center.

Important

Genesys Cloud can use the data received through the Custom Events API for journey shaping, IVR routing, and visualization to an agent. Your organization is responsible for verifying that the receipt of data into Genesys Cloud and its usage complies with your own internal policies. Administrators determine what data to show to an agent or to use for journey shaping.

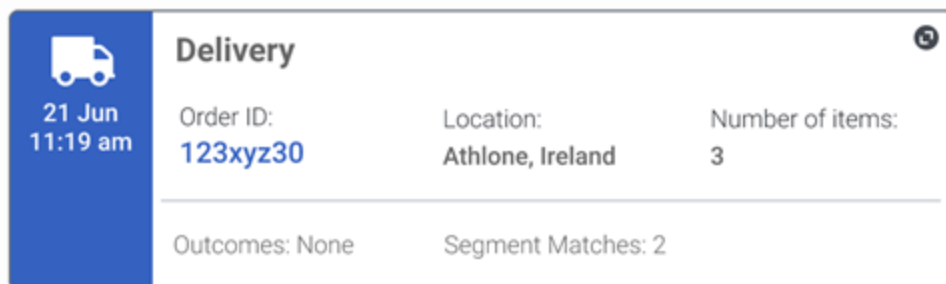
Scenario: Bike delivery

The following diagram illustrates the custom events that occur after a customer purchases a bike at a retail store and requests delivery to her home address.



1: Order placed

A customer visits a retail store and orders a custom bike. Because it is a special order, the customer requests delivery of the bike to his house. When the customer places the order, the shipment tracking system calls the Custom Events API and sends Predictive Engagement a custom event called "product_purchased" for a session of type "delivery".



The API call includes a unique external ID for the session. When Predictive Engagement receives the API request, it creates a custom session and sets the event count to one. For an example, see the API call for the first custom event.

2: Dispatch delayed

Unfortunately, one of the bike components is not available in the warehouse, which delays. The order entry system sends a notification email to the customer, and it also uses the CustomEvents API to send Predictive Engagement a second custom event in the session. For an example, see the API call for the second custom event.

3: In transit

Eventually, the custom bike is complete and it ships. The shipment tracking system sends an "in transit" custom event to Genesys Predictive Engagement.

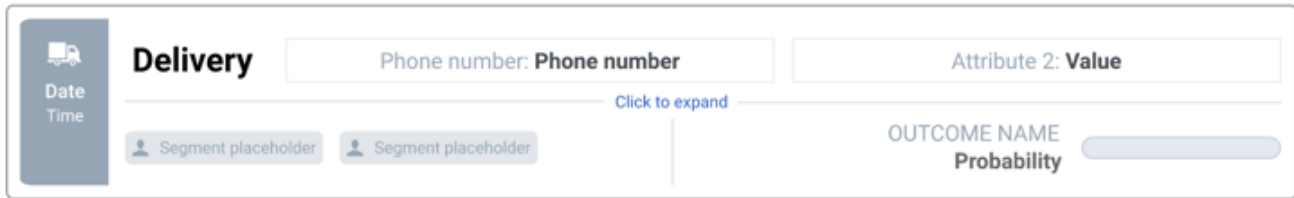
4: Item delivered

The bike is delivered, and the shipping tracking system sends a "delivered" custom event to Genesys Predictive Engagement.

Important

A custom session can continue to receive custom events indefinitely. When a new custom event arrives, Genesys Predictive Engagement evaluates its session type, external ID, and customer identifier to determine whether to update the existing session or create one.

Custom session types

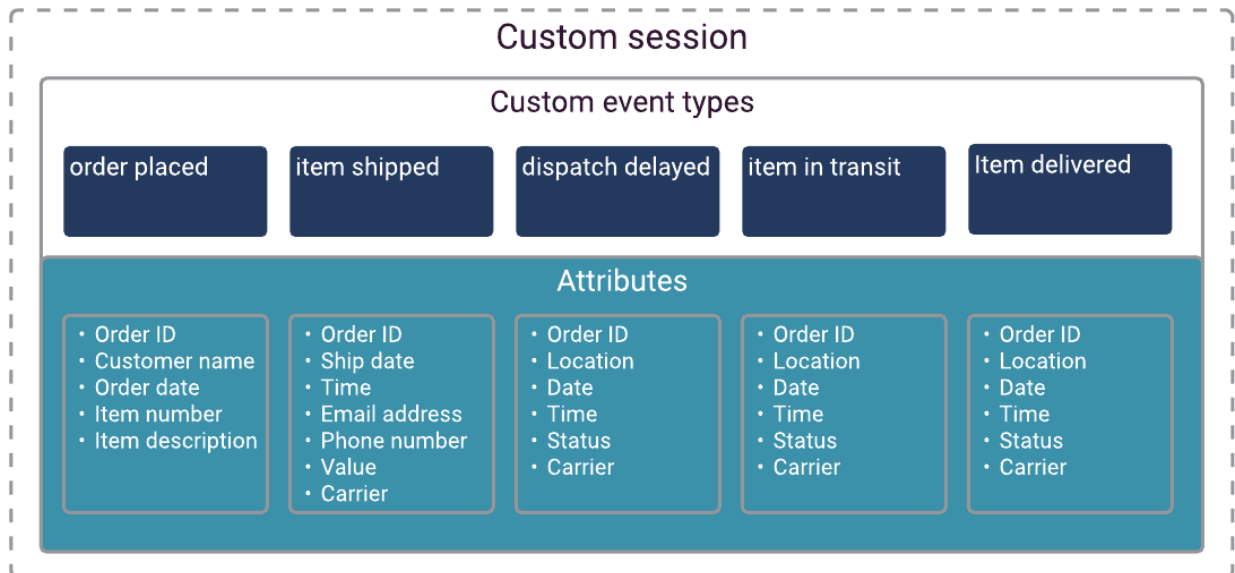


Each custom session has a type. The session type is set in the API request when the first custom event in the session arrives. You cannot change this type. For more information about setting the session type through the API, see the Session types API in the Developer Center.

The session type acts as a template that contains specific attributes that you define in the Session Library. All sessions of a given type share the same attributes. The attributes that you define for a given session type are visible to agents when they view any session of that type.

For example, in the bike delivery scenario, the session type is **delivery**. Compare the type of data agents need about **delivery** sessions (such as transit status and arrival times) to the type of data that agents need about ATM transactions (such as pre- and post- transaction balances and transfer account number). Different types of custom sessions require different sets of custom data.

Attributes for custom event types



Each custom event type includes event-specific attributes whose values can update during the course of the session. For the bike delivery scenario, the value of the **Location** attribute is set when the **in transit** custom event occurs and again when the **item delivered** custom event occurs. For more information about how to configure the appearance of the event-related information presented to agents, see [How you make event information meaningful to agents](#).

Configure how agents view custom events

You have several tools for configuring how custom session data appears to agents. Read [Session attributes and Use a projection to present a consolidated view of multiple data points](#). Then, read [Event types and Make event information meaningful to agents](#).

Other possible applications

Custom sessions are useful any time that series events are ideal for custom sessions with the following platforms and session types.

Session Type	Possible Platform Sync	Examples
Product history	CRM	Product holds, last purchase
Marketing campaign history	CRM/marketing automation	Email campaigns, SMS campaigns
Application processing	Internal ERP	Mortgages, licensing, government grants, University applications
Case management	Service platform	Support tickets, warranty
Supply chain management	Internal ERP	Deliveries, order placement, returns
Finance	Billing	Invoices, statements
Contract management	CRM/contract management	Insurance policy details, contract plan
Scheduling	ERP/CRM	Appointments, utility scheduling