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Genesys Predictive Engagement Administrator's Guide

Configure custom session cards

Contents

- [1 Overview](#)
- [2 Make event information meaningful to agents](#)
- [3 View event types for a session](#)
- [4 Configure the list of events](#)
- [5 Configure the tooltip](#)
- [6 Delete an event](#)

Feature coming soon! Learn how to configure how event-related information appears to agents.

Related documentation:

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Prerequisites

- Configure the following permissions in Genesys Cloud CX:
 - **Journey > Session Type > View**
 - **Journey > Session Type > Add**
 - **Journey > Session Type > Edit**
 - **Journey > Session Type > Delete**
 - **Journey > Event Type > View**
 - **Journey > Event Type > Add**
 - **Journey > Event Type > Edit**
 - **Journey > Event Type > Delete**

Overview

An **event type** represents a type of organization-specific activity that you track as part of a custom session or a web session. For each event type, there are multiple event instances as customers interact with your website or third-party products. Each event type has distinct attributes. For example, the Bike delivery scenario includes an **order placed** event type with an attribute of **order ID**. Each time a delivery session occurs, there are multiple **order placed** events. For each **order placed** event, there is a unique **order ID** value.

Make event information meaningful to agents

Following are the ways that you can help agents understand this event-related data:

- **Configure the list of events**
 - **Use friendly names:**

Events originate as API calls for custom events or as the result of SDK methods for a web session. When Genesys Predictive Engagement receives events, it uses the original naming conventions. Typically, these event names are technical names that may be unfamiliar to agents. You can use the Session Library to configure friendlier names that are appropriate for agents.

- **Hide unnecessary events:**

A session can provide any number of events to Genesys Predictive Engagement, but only some of those events may be helpful or useful to agents. For example, for the delivery session, you might have a custom event called Generate BOL with attributes that list all the purchased items on a Bill of Lading. A Bill of Lading is significant to personnel directly involved in the movement of freight. customers and agents would not have questions or concerns about it. Therefore, you might opt to hide all instances of this event type from agents.

- **Configure the tooltip**

- **Use friendly names:**

Agents can see an event's attributes when they rest their mouse on the event in the customer journey map. Ensure that the information appears as you want it to.

- **Hide unnecessary events:**

To keep tooltips easy to use, showcase only a few events there.

View event types for a session

The screenshot shows the 'Session Library' interface for a session named 'international_delivery'. At the top, there are 'Cancel' and 'Save' buttons. Below that, the 'Display name' is set to 'international_delivery' and the 'Session type' is 'international_delivery'. There are tabs for 'Events', 'Session attributes', and 'Session card', with 'Events' being the active tab. A table lists four event types with their attributes, display status, and actions.

Event name	Attributes	Display to agents	Actions
delivery_en_route	4	<input type="checkbox"/> No	⋮
delivery_order_processed	3	<input type="checkbox"/> No	⋮
delivery_order_shipped	3	<input type="checkbox"/> No	⋮
out_for_delivery	3	<input type="checkbox"/> No	⋮

At the bottom of the table, there is a pagination control showing '1 - 4 of 4' items, '25' items per page, and 'Page 1 of 1'.

In the Session Library, click the title of a session to see the types of events that can occur during it.

Configure the list of events

Edit event

Event information Attributes

Event name *

delivery_event_new

Display to agents

Yes

Cancel

Confirm

Assign meaningful event names and hide unnecessary events. For more information and examples, see [Make event information meaningful to agents](#).

Important

Web sessions You cannot rename or hide the following types of events:

- page_viewed
- widget_web_chat_submitted

1. Next to the event, under **Actions** click **Edit**.
2. In the **Event Information** tab, in the **Event name** box, type a meaningful name.
3. To specify whether agents see this event in the list, set the **Display to agents** toggle.

Configure the tooltip

Edit event

Event information **Attributes**

Name

Appears on event tooltip

Yes

No

No



Cancel

Confirm

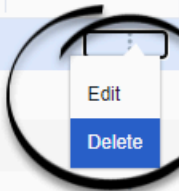
When agents rest their mouse on an event in the customer journey map, they see a tooltip that contains event details. The event attribute appears, followed by its value for the specific event. Ensure that the event attribute name is meaningful to agents. For more information and examples, see [Make event information meaningful to agents](#).

1. On the **Attributes** tab, give each event a meaningful name.
2. To display the event attribute on the tooltip, set the toggle to **Yes**.
3. To specify whether agents see this event in the tooltip, set the **Display to agents** toggle.
4. To delete a tooltip, click the Delete icon.

Delete an event

Session Library

Here is where all your sessions will live

Session name	Session type	Display to agents	Events	Actions
Billing	billing	<input type="checkbox"/> No	2	
Branch Visit	branch_visit	<input type="checkbox"/> No	3	
Car Insurance Claim	car_insurance_claim	<input checked="" type="checkbox"/> Yes	5	
Car Insurance Renewal	car_insurance_renewal	<input checked="" type="checkbox"/> Yes	2	
claire m gpe-7639	claireMgpe7639	<input checked="" type="checkbox"/> Yes	1	
international_delivery	international_delivery	<input checked="" type="checkbox"/> Yes	11	
Travel Insurance Renewal	trave_insurance_renewal	<input checked="" type="checkbox"/> Yes	1	

1 - 7 of 7 per page << < Page of 1 > >>

Deleting an event means that the event no longer appears in the Session Library and agents can no longer see it.

Important

To prevent a custom event from re-appearing, change the originating API call.