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Genesys Predictive Engagement Agent's Guide

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Learn how to use Genesys Predictive Engagement.

Get started

Get started using Genesys Predictive Engagement.

- Genesys Cloud CX
- Genesys Multicloud CX
- PureConnect

Visitor experience

Learn how Genesys Predictive Engagement engages visitors on your website.

- A visitor's experience

Agent experience

Learn what information appears when a visitor accepts an offer to chat from Genesys Predictive Engagement.

- Genesys Cloud CX
- Genesys Multicloud CX
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Get started

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Learn how Genesys Predictive Engagement works on your website

1. Learn how Genesys Predictive Engagement engages visitors on your website.
2. Familiarize yourself with the customer journey data that Genesys Predictive Engagement provides.

Get started with Genesys Predictive Engagement for Genesys Multicloud CX

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Get started with Genesys Predictive Engagement for PureConnect

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A visitor's experience

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A visitor's experience

Learn about a visitor's experience with Genesys Predictive Engagement on your website.

How chats appear

The screenshot displays the Universal Insurance website interface. At the top, a dark grey header contains the text "Visit ID: 37616" on the left, a search bar with the placeholder "enter your email" in the center, and "Login" and "Sign Up" buttons on the right. Below the header is the Universal Insurance logo. A navigation menu follows with links for "Home", "Auto Insurance", "Home Insurance", "Business Insurance", "Life Insurance", and "Claim Centre". A secondary menu below it includes "Quote Details", "Confirm Details" (highlighted in a green box), "Additional Information", and "Purchase Policy".

The main content area is divided into three sections:

- TERMS AND CONDITIONS:** A green header with a document icon. The text explains that personal data collection is required for quotes and includes a checkbox for "I agree to the Terms & Conditions". It also provides a link to "Terms & Conditions" and a link to "view these" assumptions.
- POLICY HOLDER:** A green header with a person icon. It features a large image of a black BMW sedan.
- POLICY DETAILS:** A green header with a document icon. It contains a text prompt about license plate search, a "License Plate Number" input field with "1234" entered, a red "CALL US NOW" button, a checkbox for "Please check this if you don't know your license plate number", and input fields for "Year of Manufacture", "Make", "Model", "Style", "Engine Size", "Annual Miles Travelled", and "Licence Type".

At the bottom left, an **INFORMATION** section (green header with an 'i' icon) lists options to "Add another driver", "Add a penalty point", "Add non Motor Conviction", and "Add a Claim/Accident", each with a corresponding button.

Overlaid on the bottom right is a "Live Chat" window with a dark grey background. It has a close button (X) in the top right corner. The text inside reads "Hi there, can we help with your quote ?" with two buttons: "No, thanks" and "Yes". At the bottom of the chat window, it says "Powered by GENESYS".

A web chat provides single-session chat capabilities to your website visitors

A visitor's experience

through a chat window. The chat window can appear when a visitor takes a specific action that prompts a chat offer, such as requesting a quote, or clicks an option to start a chat interaction. If the visitor accepts the chat offer or starts a chat interaction, Genesys Predictive Engagement routes the interaction to an agent queue.

How Messenger appears

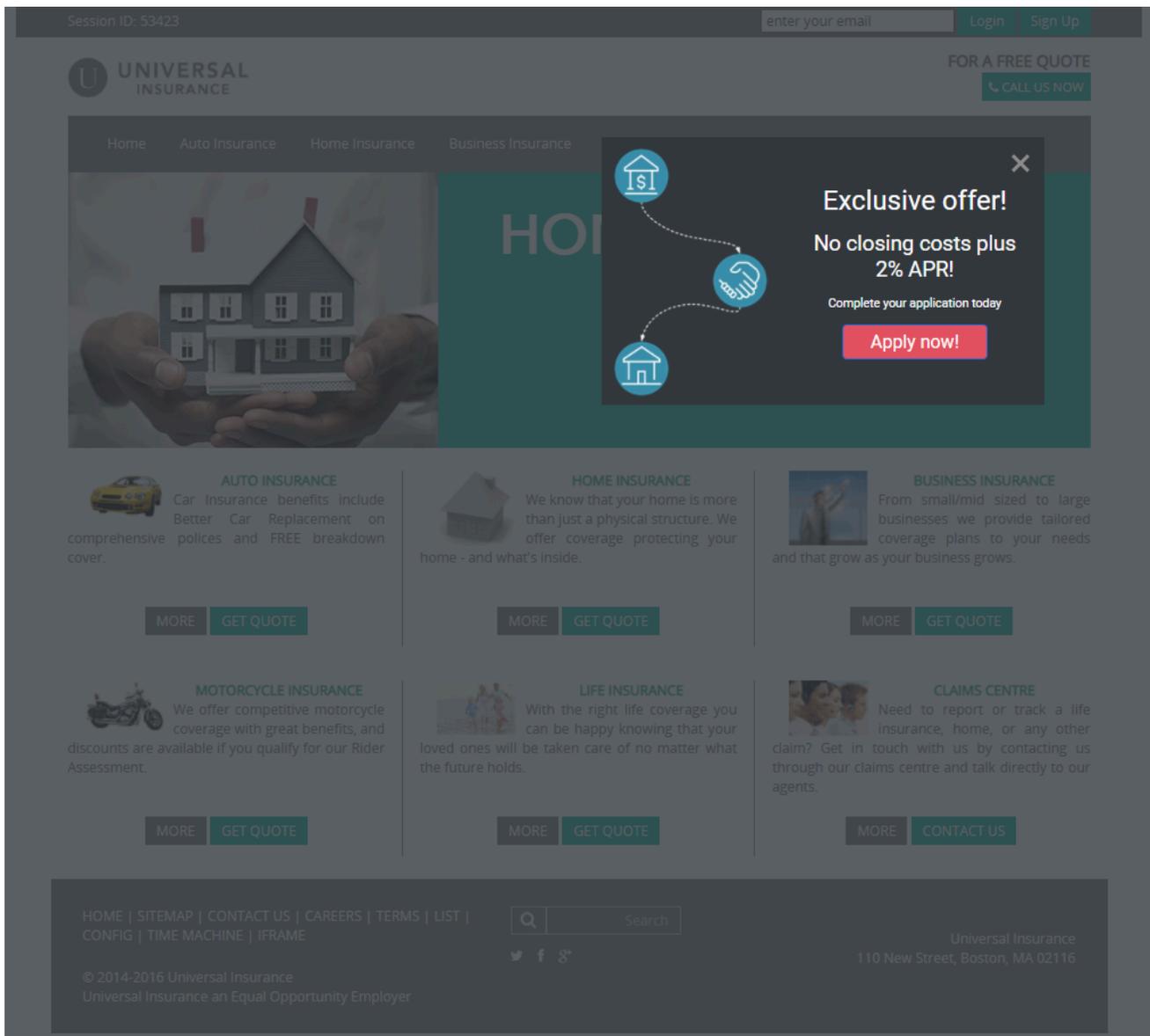
The screenshot displays the Universal Insurance website interface. At the top, there is a session ID (13656), an email input field, and 'Login' and 'Sign Up' buttons. The main navigation includes 'Home', 'Auto Insurance', 'Home Insurance', 'Business Insurance', 'Life Insurance', and 'Claim Centre'. A large banner for 'HOME INSURANCE FIRST TIME BUYERS SPECIAL DEAL' is visible. Below the banner are four insurance categories: 'AUTO INSURANCE', 'HOME INSURANCE', 'MOTORCYCLE INSURANCE', and 'LIFE INSURANCE', each with a brief description and 'MORE' and 'GET QUOTE' buttons. A 'Message Us' chat window is overlaid on the right side, showing a conversation with the text: 'This is the beginning of your conversation with us. Please send a message to get started.' followed by a 'Hello' button and a response: 'Hi there 🌟 Thanks for reaching out!'. The footer contains links for 'HOME', 'SITEMAP', 'CONTACT US', 'CAREERS', 'TERMS', 'LIST', 'CONFIG', 'TIME MACHINE', and 'IFRAME', along with a search bar and social media icons. Copyright information for 2014-2016 Universal Insurance is also present.

If you are a Genesys Cloud CX customer, your organization might be using the new web messaging

feature instead of web chat.

Web messaging provides asynchronous conversation capabilities to your website visitors through a Messenger window. For example, visitors can message you, leave your website, and return later to pick up the conversation where they left off. The Messenger window can appear when a visitor takes a specific action that prompts a messaging offer, such as requesting a quote, or clicks an option to start a messaging interaction. If the visitor accepts the messaging offer or starts a messaging interaction, Genesys Predictive Engagement routes the interaction to an agent queue.

How content offers appear



A content offer engages visitors on your website and encourages them to take a pre-defined action. A content offer can appear when a visitor takes a specific action, such as reviewing mortgage rates. If the visitor clicks the content offer, Genesys Predictive Engagement takes whatever action an administrator configured for the offer. For example, display a mortgage application.

An agent's experience in Genesys Cloud CX

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- [1 About customer journey](#)
- [2 View a customer's journey](#)
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Learn about the customer journey data that Genesys Predictive Engagement presents to agents in Genesys Cloud CX.

Prerequisites

The following permissions are available by default to the role 'User'. If you are creating custom roles, ensure that you add the following permissions to the custom role.

- Configure the following permissions in Genesys Cloud CX:
 - **Journey > Event > View** (core permission to view the Customer journey gadget and to see detailed view web sessions)
 - **Journey > Event Type > View** (to allow customization of web sessions)
 - **Journey > Session > View** (to retrieve list of web session)
 - **Journey > Session Type > View** (to retrieve details of web sessions)
 - **Journey > Outcome > View** (to see outcomes achieved and scores for a visit)
 - **Journey > OutcomeScores > View** (to see real-time predictions)
 - **Journey > Segment > View** (to see matched segments for a visit)
 - **Routing > Wrap up code > View** (to view the wrap-up codes associated with the interaction)
 - **Routing > Queue > Search** (to view the queue the interaction is part of)
 - **External contacts > Session > View** (enables view of customer journey tab)

Important

If you are a Genesys Cloud CX customer, your organization might be using web messaging instead of web chat.

About customer journey

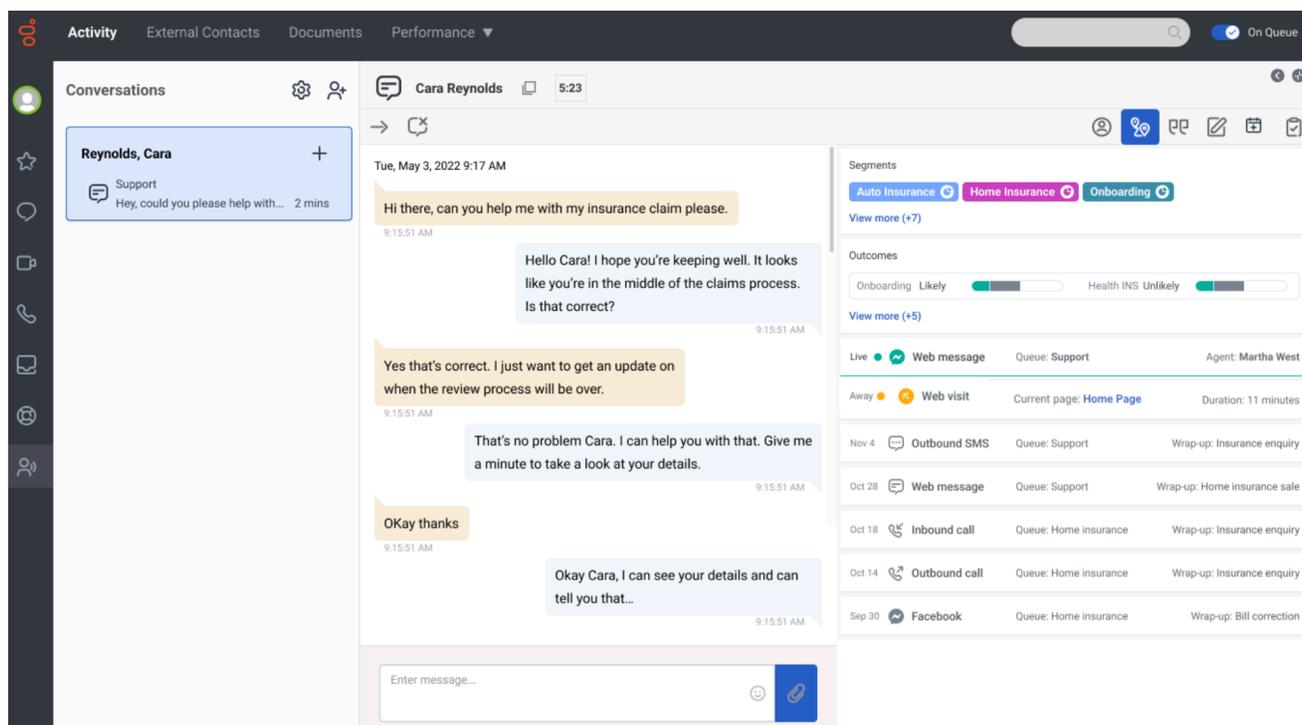
Using the customer journey tab, you can view an overall summary of the different conversations you have had with the customer and the customer web visits of the websites that Genesys Predictive Engagement tracks. Customer journey information is available for conversations from the following channels:

- Voice
 - Inbound calls

- Agent-initiated outbound calls
- Messaging
 - Web Messaging
 - Web chat
- Digital
 - Email
 - SMS
 - Agentless notifications (WhatsApp and SMS)
- Social media
 - WhatsApp
 - LINE
 - Twitter SM
 - Facebook messenger
- Website visits
 - Web Events (Genesys Predictive Engagement only)
 - Content Offers (Genesys Predictive Engagement only)

Customer journey information is not available for conversations from the following channels:

- Knowledge - Support center
- Agentless email notifications
- Campaigns, including callbacks
- Co-browse
- Instagram DM



To view all the conversations you have had with your customer, click the Customer journey icon:



- The tab lists the different journeys. Click each journey item to view further details in the "Message Details" section. The message details section displays the details of the last queue and the most recent agent who last handled the interaction.
- Genesys Cloud visualizes bot-only conversation sessions (no agent) using the standard conversation session card, and will display data common to bot and agent conversations (e.g. channel, originating direction, duration, some status values)
- Data from the last 60 days are available on this tab.

Important

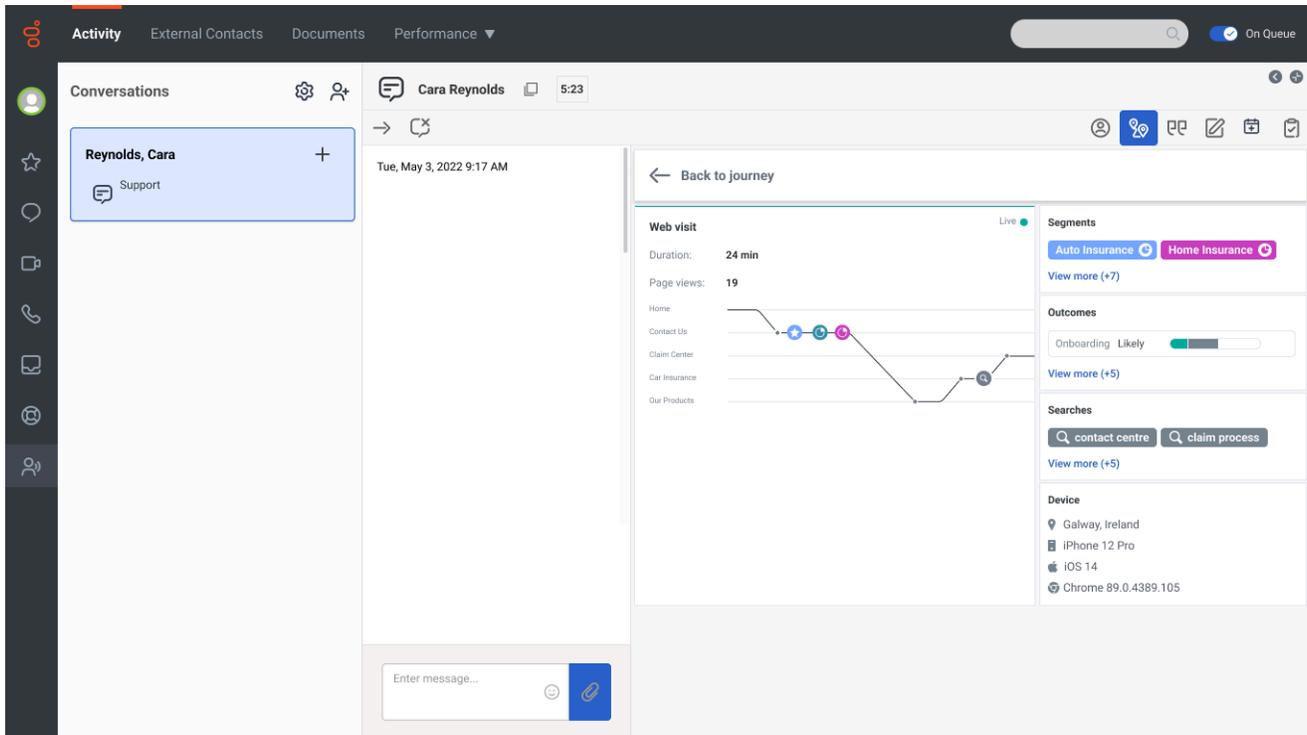
When a logged in user logs out and continues to use the website, Predictive Engagement considers the user as a new user and creates a new journey map for all actions of the unauthenticated user actions.

Important

Ensure that you add the External contacts > Session > View permission to your role to

view the customer journey gadget.

View a customer's journey



The customer journey map updates in real time as the customer navigates your website, responds to interaction requests, and segments and any outcomes matched.

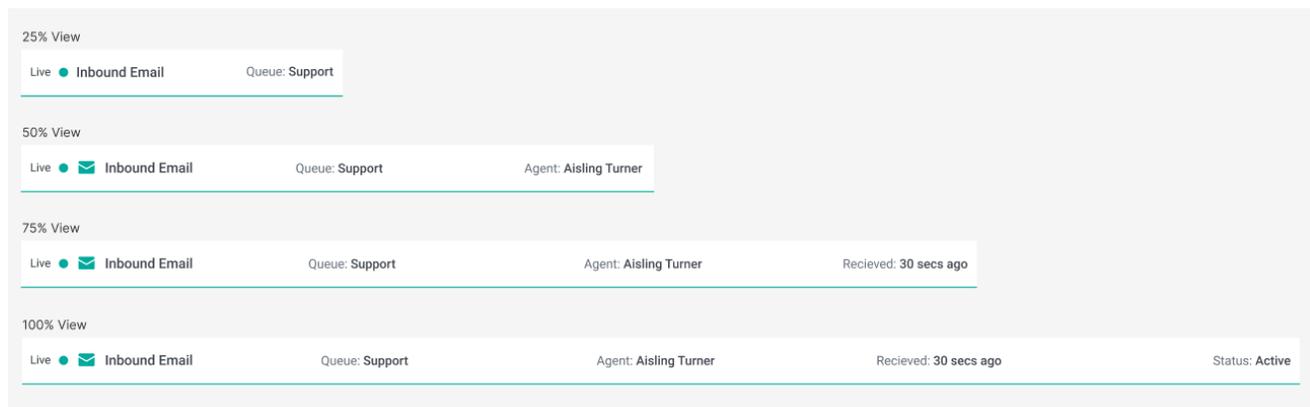
The customer journey map has the following:

- **Segments matched:** A segment represents a group of customers that have something in common. For example, a segment might include all customers who use the same browser or are from the same geographic region. Segments appear in the order that Genesys Predictive Engagement assigns them to the customer. You can view the segments that a customer visit matched from both the segment icon on the journey map and from the "Segments" section. For more information about segments, see About segments.
- **Searches performed:** Knowing what customers searched for on your website prepares you to answer questions that they may have. You can view the search details from both the search icon in the customer journey map and from the "Searches" section.
- **Outcomes matched:** An outcome represents a particular goal and the colored bars represent the customer's progress toward that goal. For example, if the goal is to purchase a product, the customer's progress moves toward that goal when the customer puts an item in their shopping cart. These bars update in real time as the customer's progress changes. For more information about outcomes, see

About outcome predictions and probabilities.

- **Device information:** Information about the website visitor's device, such as geographic location, device type, operating system, and browser. For information on the icons used to represent the device information, see Device icons.
- **Agent and queue details:** To view the agent and queue details, click the interaction. The journey tab displays the information at the bottom. If an interaction was transferred between different queues and agents, details of the last queue and agent are displayed.

Change the layout of the customer journey tab



You can choose to view the page in four different layouts: 25%, 50%, 75%, or 100% layout. The journey information that is displayed varies based on the layout you select.

Understand the status of the customer journey tab items

Active conversations

25% View	Live ● Inbound Email	Queue: Support			
50% View	Live ● Inbound Email	Queue: Support	Agent: Aisling Turner		
75% View	Live ● Inbound Email	Queue: Support	Agent: Aisling Turner	Received: 30 secs ago	
100% View	Live ● Inbound Email	Queue: Support	Agent: Aisling Turner	Received: 30 secs ago	Status: Active

Inactive conversations

25% View	Sep 30 Inbound Email	Queue: Support			
50% View	Sep 30 Inbound Email	Queue: Support	Subject: Insurance enquiry		
75% View	Sep 30 Inbound Email	Queue: Support	Subject: Insurance enquiry	Agent: Aisling Turner	
100% View	Sep 30 Inbound Email	Queue: Support	Subject: Insurance enquiry	Agent: Aisling Turner	Status: Closed

For active conversations and web visits, a green status icon appears on the first column. After 45 seconds of inactivity, the icon changes to yellow. After 1 minute of inactivity, the interaction shows as inactive. It remains inactive unless the customer triggers another web event (for example, a page view), at which point the interaction shows the green icon again.

An agent's experience in Genesys Multicloud CX

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Genesys Predictive Engagement presents customer journey information to agents.

Customer journey information in Genesys Multicloud CX

The screenshot displays a customer profile and session details. The 'Visitor details' section includes the name 'Bugs Something Bunny', status 'Offline', session count '22', and selected session page views '1'. Contact information such as email and phone numbers is also listed. The 'Session details' section shows the session date as 'May 17, 2022 5:58 PM' with a duration of '< 1 minute' and '1' page view. The 'Session journey' section features a visual timeline of page views, starting with 'Home Insurance'. The 'Searches performed' section indicates 'No Searches Performed'. The 'Segments assigned' section lists various segments like 'heather testing journey patterns', 'MS Chrome', and 'home insurance'. The 'Outcome scores' section shows progress bars for 'Auto-insurance outcome' (Very likely), 'Purchase Insurance' (Very unlikely), 'associated Value Test' (Unlikely), and 'StaticReportingTestOutcomeValue' (Achieved!). The bottom section provides technical details: Location (Carlow, Ireland), Device type (Apple Desktop), Operating system (Mac OS X Unknown), and Browser type (Chrome 101.0.4951.54).

If a visitor accepts an offer to chat from Genesys Predictive Engagement, you see a new tab in your Genesys Multicloud CX Workspace when you receive the interaction.

In Agent Workspace (Workspace Web Edition), customer journey information appears on the **Journey** tab. In Workspace Desktop Edition, customer journey information appears on the **Altcloud** tab. The information updates as you interact with the visitor.

1. Visitor details
2. Session details
3. Session journey
4. Searches performed

5. Segments assigned
6. Outcome scores
7. Location and technology

Visitor details

Visitor details includes the visitor's name, current status, and the total number of times that the visitor viewed any of your tracked web pages during the current session. If Predictive Engagement cannot identify the visitor, "Unknown" appears in the **Name** box. If Predictive Engagement identifies the visitor later on, the visitor's name appears.

Session details

Predictive Engagement tracks visitor activity by session. When you view a visitor's summary, you see information for the current session. To see a different session, click it in the **Sessions** list box.

Session journey

The session journey map includes:

- Pages that a visitor saw and the sequence in which the visitor saw them
- Types of engagements that the visitor had with an agent or with Predictive Engagement while on a page, and when
- Segments that the visitor matched, and when

To see details about a point on the map, click the icon.

Searches performed

Knowing what visitors searched for on your website prepares you to answer questions that they may have. Search information appears in two places.

- To see what the visitor searched for at a specific point in the visitor's journey, in the journey map, click a search icon.
- To view a list of all the terms that the visitor searched for during the session, look in the "Searches performed" section.

Segments assigned

A segment represents a group of visitors that have something in common. For example, a segment might include all visitors who use the same browser or are from the same geographic region. Segments appear in the order in which Predictive Engagement assigns them to the visitor.

Outcome scores

A solid green bar indicates that the visitor achieved the outcome. A bar with green and red indicates that the visitor has not yet achieved the outcome. The amount of green indicates approximately how close the visitor is to achieving the goal.

Location and technology

A visitor's location and technology information includes data on visitor's device, browser, and operating system that are represented with icons:

- Browser
- Device
- Operating system

For more information

- [Genesys Multicloud CX: Genesys Multicloud CX Agent's Guide](#)
- [Genesys Engage on-premises: Predictive Engagement Chat Interaction](#)

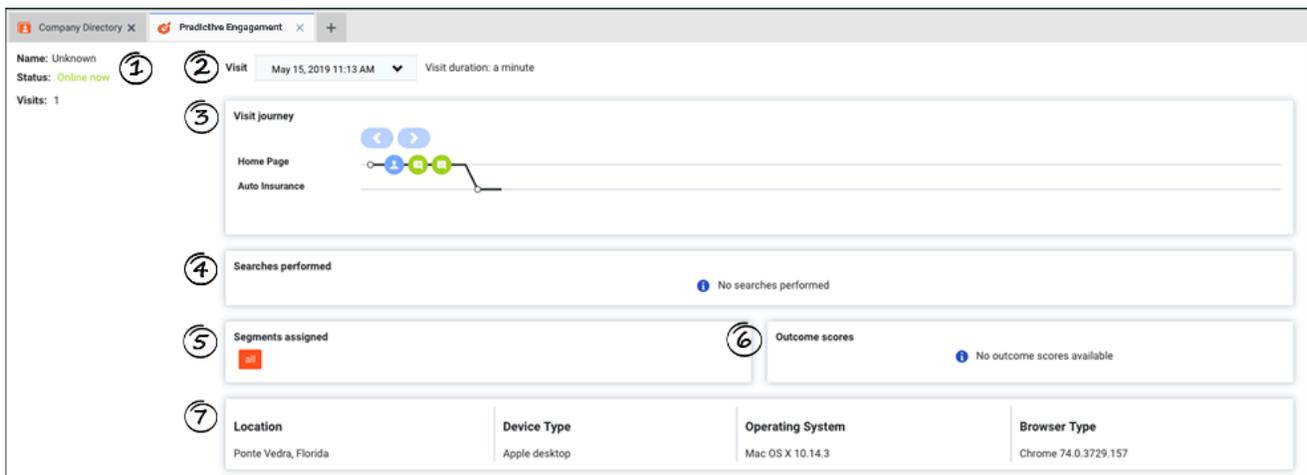
An agent's experience in PureConnect

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Genesys Predictive Engagement presents customer journey information to agents.

Predictive Engagement view in PureConnect



If a visitor accepts an offer to chat from Genesys Predictive Engagement, you can display the visitor's journey in the Predictive Engagement view in Interaction Connect when you pick up the interaction. The information updates as you interact with the visitor.

1. Visitor information
2. Session information
3. Visit journey map
4. Searches performed
5. Segments assigned
6. Outcome scores
7. Location and technology

Visitor information

Visitor information includes the visitor's name, current status, and the total number of times that the visitor viewed any of your tracked web pages during the current session. If Predictive Engagement cannot identify a visitor, "Unknown" appears in the **Name** box. If Predictive Engagement identifies the visitor later on, the visitor's name appears.

Session information

Predictive Engagement tracks visitor activity by session. When you view a visitor's summary, you see information for the current session. To see a different session, click it in the **Sessions** list box.

Visit journey map

The visit journey map includes:

- Pages that a visitor saw and the sequence in which the visitor saw them
- Types of engagements that the visitor had with an agent or with Predictive Engagement while on a page, and when
- Segments that the visitor matched, and when

To see details about a point on the map, click the icon.

Searches performed

Knowing what visitors searched for on your website prepares you to answer questions that they may have. Search information appears in two places.

- To see what the visitor searched for at a specific point in the visitor's journey, in the journey map, click a search icon.
- To view a list of all the terms that the visitor searched for during the session, look in the "Searches performed" section.

Segments assigned

A segment represents a group of visitors that have something in common. For example, a segment might include all visitors who use the same browser or are from the same geographic region. Segments appear in the order in which Predictive Engagement assigns them to the visitor.

Outcome scores

A solid green bar indicates that the visitor achieved the outcome. A bar with green and red indicates that the visitor has not yet achieved the outcome. The amount of green indicates approximately how close the visitor is to achieving the goal.

Location and technology

A visitor's location and technology information includes data on visitor's device, browser, and operating system that are represented with icons:

- Browser
- Device
- Operating system

For more information

- Predictive Engagement view in Interaction Connect
- Genesys Predictive Engagement integration

Journey map icons

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Learn about the icons that could appear on the visitor journey map.

About the icons

Each icon represents a type of activity that occurred during a particular session. The position of the icon on the journey map indicates the order in which the activity occurred.

Following are the types of icons that could appear:

- Web messaging
- Web chat
- Form activity
- Journey shaping
- Miscellaneous
- Custom events
- Call

Web messaging icons

These icons are only available to Genesys Cloud CX customers who are participating in the beta release for identity stitching.

Icon	Name	Description
	Messaging offer accepted	Website visitor accepted the messaging offer.
	Messenger error	Messenger experience an error.
	Messaging offer ignored	Website visitor left your website before responding to the messaging offer.

Journey map icons

Icon	Name	Description
	Messaging interaction offered	Predictive engagement presented a messaging offer to the website visitor.
	Messaging offer rejected	Website visitor rejected the messaging offer.

Web chat icons

Icon	Tooltip	Description
	Chat offered	Genesys Predictive Engagement offered a chat to the user.
	Chat accepted	User accepted the offer to chat.
	Chat form completed	User completed the form to request a chat.
	Chat rejected	User rejected the offer to chat.
	Chat timed out	Offer to chat timed out before the user responded.
	Chat ignored	User left the website before responding to the chat offer.
	Chat error	Chat experienced an error.

Form-related icons

Journey map icons

Icon	Tooltip	Description
	Form submitted	User submitted a form.
	Form abandoned	User abandoned the form before completing it.

Journey shaping icons

Icon	Tooltip	Description
	Outcome achieved	User achieved one of your outcomes.
	Segment matched	User matched one of your segments. The color of the icon matches the color of the corresponding segment.

Miscellaneous icons

Icon	Tooltip	Description
	Searched	User searched for something on your site.
	Default	Default icon used when no other icon is applicable.

Custom event icons

Journey map icons

Icon	Tooltip	Description
	Delivery	Delivery event occurred.
	Invoice	Invoice event occurred.
	Application	Application-related event occurred.
	Contract	Contract event occurred.
	Default Event	Default icon used for a custom event when no other icon is applicable.

Call icons

Icon	Name	Description
	Abandoned	Customer abandoned the call.
	Inbound call	Agent received an inbound call.
	On hold	Agent placed the call on hold.
	Outbound call	Agent placed an outbound call.

Journey map icons

Icon	Name	Description
	Transferred	Agent transferred the call.

Session information icons

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Session information icons

Learn about the icons for browsers, devices, and operating systems that Genesys Cloud CX agents see when they review a session card for a visitor.

Session information icons

The screenshot displays a detailed session card for a visitor on 17 Sep at 12:00 PM. The card includes a navigation path with icons for each step, a list of searches (e.g., 'teen driving', 'family discount'), and segments (e.g., 'U.S. User', 'Chrome User'). Outcome predictions are shown as progress bars for 'Quote requested' (Likely), 'Make Claim' (Very unlikely), and 'Business insurance purchased' (Very unlikely). A callout box highlights the 'Session info' icons: a location pin, a browser icon, an Apple logo, and a Windows logo.

Session Info	Value
Duration	17 Sep 12:00 PM
Current page	Auto Insurance
Searches	2
Segments	3
Outcome Predictions	3

Session Info	Value
Duration	17 Sep 10:00 AM
Current page	Home Page
Searches	-
Segments	2
Outcome Predictions	3

Session information icons provide information about a visitor's location and equipment.

Devices

Session information icons

Device	icon
Desktop	
Laptop	
Mobile	
Tablet	

Operating system

Operating system	Icon
Android	
Linux	
MacOS	
Windows	
Other	OS

Browsers

Browser	Icon
Chrome	
Edge	
FireFox	
Internet Explorer	
Opera	
Other	
Safari	

Genesys Predictive Engagement Agent FAQs

This page lists all FAQs for Genesys Predictive Engagement agents.

GenesysCloud

No FAQs for this platform yet.

GenesysEngage

No FAQs for this platform yet.

PureConnect

No FAQs for this platform yet.