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Genesys Predictive Engagement - Salesforce Lightning integration

10/7/2022

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Feature coming soon! Integrate Genesys Predictive Engagement in Salesforce Lightning so that agents can view customer journey data.

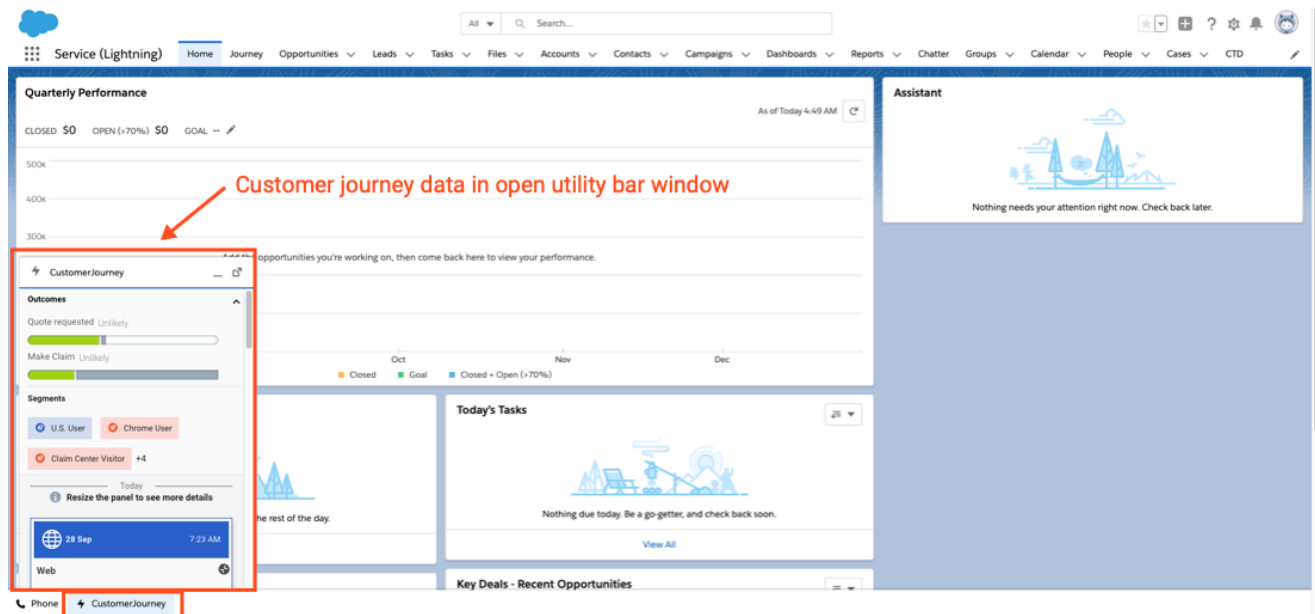
Configuration options

An administrator can configure Salesforce Lightning Experience to display the customer journey data to agents as a utility bar, embedded in a record details page, or as its own custom page.

For more information about the configuration options, see [Customer journey in the Genesys Cloud CX embedded clients](#).

For more information about the customer journey data that agents see, see [Customer journey](#).

Customer Journey utility bar



Record details page

Customer journey data embedded in records details page

Subject	Name	Relate...	Due Date	Status	Priority	Assigned Alias	Last Modified Date/Time	Last Modifie...
Chat 9/28/2020, 7:23:47 AM			9/28/2020	Completed	Normal	amy_agen	9/28/2020 4:40 AM	amy_agen
Chat 9/28/2020, 7:41:23 AM			9/28/2020	Completed	Normal	amy_agen	9/28/2020 4:41 AM	amy_agen

Outcomes

- Quote requested: Unlikely
- Make Claim: Unlikely

Segments

- U.S. User
- Chrome User
- Claim Center Visitor +4

Web

Duration: Active Now
Current page: Home Insurance
Session info: [Icons]

Interaction Details

Assigned To: Amy Agent
Subject: Chat 9/28/2020, 7:41:23 AM
Due Date: 9/28/2020
Priority: Normal
Call Duration: [Field]
After Call Time: [Field]
Interaction Details Link: <https://apps.mypurecloud.com/directory/#/engage/admin/interactions/51044dcb-1241-47b1-8025-1846c00aa12c>
Created By: Amy Agent, 9/28/2020 4:41 AM
Comments: participant.data

Custom page

Custom page for customer journey data

Outcomes

- Quote requested: Unlikely
- Make Claim: Unlikely

Segments

- U.S. User
- Chrome User
- Claim Center Visitor +4

Web

Duration: Active Now
Current page: Home Insurance
Session info: [Icons]

Outcome Predictions

- Quote requested: Unlikely
- Make Claim: Unlikely
- Business insurance purchased: Very unlikely

Stages

- Claim Center Visitor
- High-value prospect
- New policy +1