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Using Predictive Engagement in Genesys Multicloud CX

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This article is a high-level overview of the process to add Genesys Predictive Engagement to a Genesys Multicloud CX contact center.

Genesys Predictive Engagement, formerly called *Altocloud*, is a real-time journey-analytics platform that tracks customer activities on your website. Predictive Engagement predicts, in real time, the probability that a customer will complete activities associated with one of your business goals. Because Predictive Engagement is an AI-driven customer engagement platform, it learns to engage with customers at the *right time*, offering a chat option or a content offer. Predictive Engagement does not interfere with a customer who is successfully navigating your website and aligned with your business goals.

Getting started with Genesys Predictive Engagement

Genesys Predictive Engagement integrates with Genesys Widgets to offer the customer-engagement features. The Genesys Professional Services team can assist you in making sure that your environment has the necessary Genesys Multicloud CX prerequisites. The Professional Services team also performs the initial provisioning of Predictive Engagement.

Once that's finished, you receive information by email to help you get started. The email includes information about how to activate your Genesys Cloud CX features and create your account in the Genesys Cloud CX Admin UI.

Predictive Engagement settings and views

Administrators use the Predictive Engagement section of the Genesys Cloud CX Admin UI to configure features, to observe activity on your customer website in real time, and to view reports. Developers and supervisors can have access to the Genesys Cloud CX Admin UI as well. *You* decide which roles in your contact center require such access. Permissions configuration controls access.

Your Genesys Multicloud CX support team works with you to ensure that configuration at your contact center does not block domains associated with Predictive Engagement functionality. For customer-journey tracking purposes, you must also ensure that your website domain is an authorized originator of web journey events. For more information about web tracking and specifying allowed domains, see [Web tracking and Required Genesys Cloud CX domains](#). For more information about tracking capabilities and customization, see [\[\[ATC/Current/AdminGuide/About_tracking\]\]](#).

Viewing customer journey activity in real time


The Predictive Engagement configuration section in the Genesys Cloud CX Admin UI includes **Live Now**, which administrators, developers, and supervisors can use when access permissions are configured for each of those roles. Customer journey activity is tracked in real time in **Live Now**.

Agents with the correct permissions and privileges have a **Journey** tab in Agent Workspace. Like Live Now, the **Journey** tab provides a view of customer journey activity in real time.

Overview of the initial configuration

[Link to video](#)

After you receive the Genesys Cloud CX feature activation email from Genesys and have set up your account in the Genesys Cloud CX Admin UI, you can access the Admin UI from the Genesys portal. To open the login page, click the

Altocloud tile . To access Predictive Engagement configuration pages, open the Admin area of the Genesys Cloud CX UI. The video shows you how to navigate to the Predictive Engagement configuration section.

The following sections provide introductory information about integrating Genesys Predictive Engagement into your contact center:

- Configure permissions and privileges
- Configure journey shaping settings
- Configure your webpages
- Use Live Now
- Create engagement logic
- Enable agent access to the Journey tab in Agent Workspace

For more information about the tabs and features that you use to configure Predictive Engagement and monitor website activity, see the *Genesys Predictive Engagement Administrator's Guide*. Genesys Cloud CX browser support is described in Genesys Cloud CX system requirements. For a list of relevant information resources, see Relevant information resources.

Configure permissions and privileges

Genesys configures initial user roles and assigns some of the Predictive Engagement-related permissions to those roles. For example, Genesys personnel configure the Administrator role, which contains a preliminary set of access permissions for the Genesys Cloud CX Admin UI. Work with your Genesys Multicloud CX support team to complete the configuration and assignment of permissions and privileges.

For the list of Predictive Engagement-related permissions available in Genesys Cloud CX, see Predictive Engagement permissions overview.

For more information about Genesys Cloud CX user roles, see the Products, roles, and permissions list.

In addition to Genesys Cloud CX permissions, agents can sometimes require more Genesys Multicloud CX access privileges than they currently have. Access privileges apply to Genesys Multicloud CX

features and functionality and are not specific to Predictive Engagement; your Genesys Multicloud CX support team can assist with this configuration.

To provision more agents after the initial service roll-out, you might need to open a Service Request with Genesys Customer Care.

Configure journey shaping settings

Journey shaping refers to the configuration of Predictive Engagement to categorize website visitors and to define your business objectives for each category.

You use the Genesys Cloud CX Admin UI to configure such things as segments and outcomes. Segments categorize your website visitors into audiences. For example, if you sell insurance, then you might have a segment for home insurance customers and a segment for car insurance customers. Outcomes represent business objectives. Predictive Engagement uses *outcomes* to predict whether a visitor's behavior is leading them to achieve a desirable result on their own, or whether an agent must intervene.

If you are new to journey shaping configuration, watch the following videos for demonstrations:

- Video: Segment based on search queries
- Video: Build a segment of users who wait 6 seconds

Configure your webpages

Configure the webpages on your customer-facing website to interact with Genesys Predictive Engagement customers and to track customer activities. You must deploy both Genesys Widgets and the Predictive Engagement tracking snippet. Predictive Engagement integrates with Genesys Widgets to handle interactions with customers on your website. The tracking snippet tracks the customer journeys.

To deploy and configure Genesys Widgets for use with Genesys Predictive Engagement, you must use the Genesys Multicloud CX v3 REST API transport. If you have not previously deployed Genesys Widgets on your website, then contact your Genesys customer service representative to obtain the following information:

- the URL for the Genesys Multicloud CX v3 REST API chat service (`transport.dataURL`)
- the API key (`transport.headers[x-api-key]`)

For more information about the configuration options associated with the v3 REST API transport, see WebChatService. For deployment and configuration information, see the *Widgets Developer's Guide* and *Widgets API Reference*. In particular, see Genesys Widgets deployment guide and Configure widgets and services.

If you are already running Genesys Widgets, ensure that you have the correct version. You can fetch the latest version from the public Content Delivery Network (CDN); the instructions are in the *Widgets Developer's Guide*.

Configure your Genesys Widgets to enable web chat on every webpage.

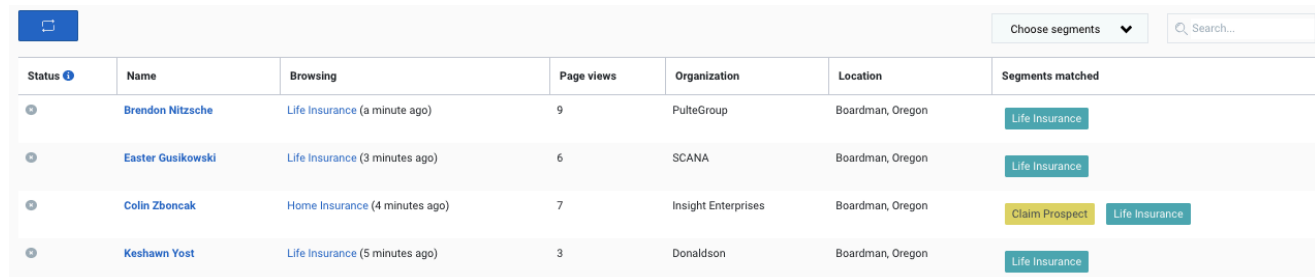
After you have deployed Genesys Widgets, add the Journey JavaScript SDK (tracking snippet) to the

webpages that you want Predictive Engagement to observe. The tracking snippet tracks user activity on webpages within any industry-standard browser such as Google Chrome, Apple Safari, Mozilla Firefox, and Microsoft Edge.

Use Live Now

The **Predictive Engagement** configuration section of the Genesys Cloud CX Admin UI includes **Live Now**, which displays – in table format – real-time information about visitors to your website. **Live Now** lists the users currently on your website, with information about each one such as the user's status, segment, and what he or she is browsing. Click a user's name to find detailed information about that person's activity.

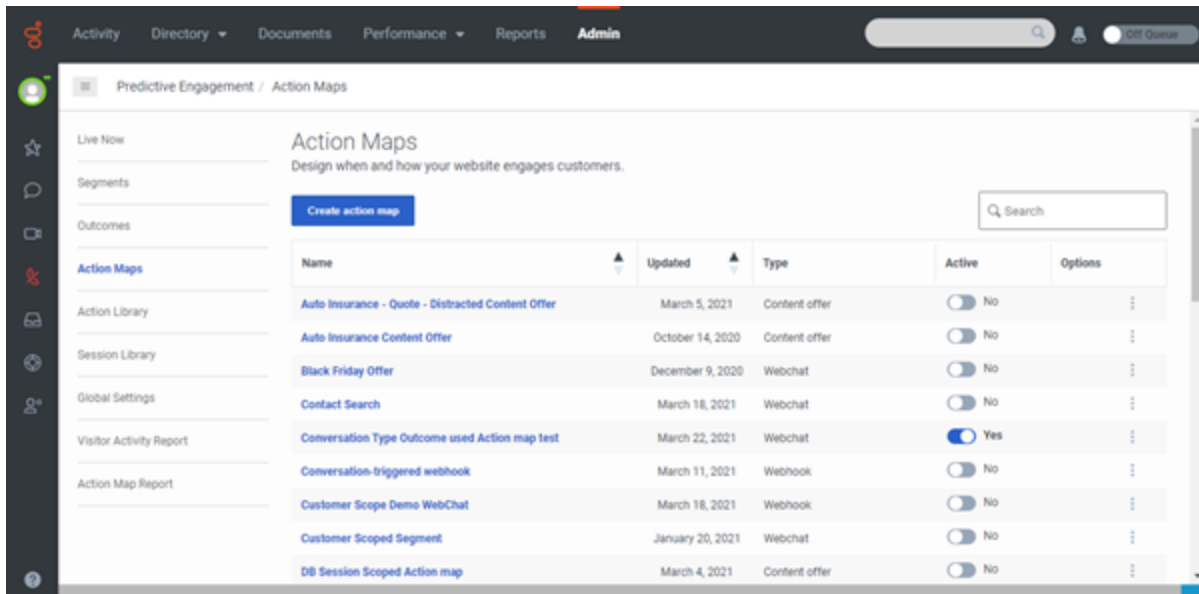
An administrator can use **Live Now** to confirm that Predictive Engagement is properly provisioned and functional. If everything is configured correctly and there is activity on a tracked page somewhere on the website, then **Live Now** displays the activity in real time.



Status ⓘ	Name	Browsing	Page views	Organization	Location	Segments matched
⊙	Brendon Nitzsche	Life Insurance (a minute ago)	9	PulteGroup	Boardman, Oregon	Life Insurance
⊙	Easter Gusikowski	Life Insurance (3 minutes ago)	6	SCANA	Boardman, Oregon	Life Insurance
⊙	Colin Zboncak	Home Insurance (4 minutes ago)	7	Insight Enterprises	Boardman, Oregon	Claim Prospect Life Insurance
⊙	Keshawn Yost	Life Insurance (5 minutes ago)	3	Donaldson	Boardman, Oregon	Life Insurance

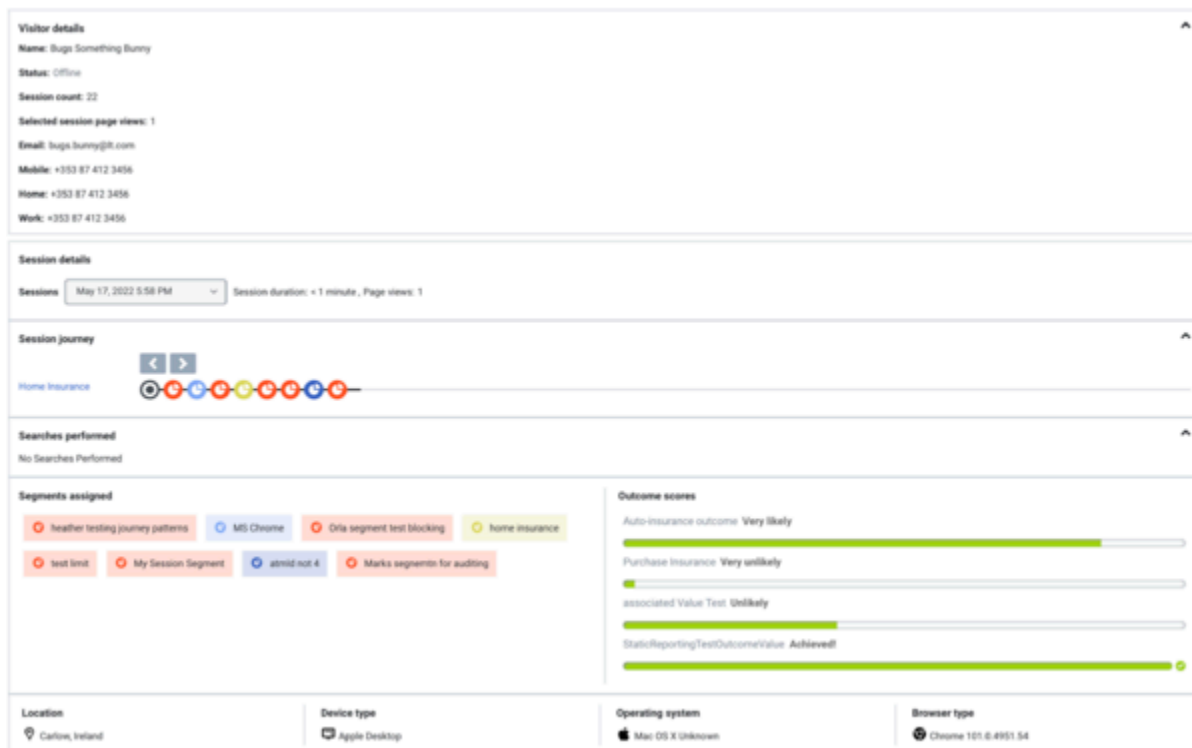
Create engagement logic

In the **Predictive Engagement** section of the Genesys Cloud CX Admin UI, an administrator configures action maps to specify when and how to engage with website visitors. Action maps and actions work together to provide meaningful and timely customer engagement. When a customer visits a website that Predictive Engagement tracks, Predictive Engagement monitors the customer's behavior and uses action maps to determine when and how to take action.



Enable agent access to the Journey tab in Agent Workspace

Genesys personnel do the initial configuration that makes the Predictive Engagement **Journey** tab accessible in Agent Workspace. Once configured, the **Journey** tab displays in Agent Workspace when the agent receives and accepts his or her first Predictive Engagement interaction.



The **Journey** tab includes information about a customer's web session activity, including the customer's segment as well as the outcomes and outcome scores. The information on the tab updates dynamically in real time as the customer browses your website.

If you have access to **Agent Setup** on the Genesys portal, then you can manage the assignment and configuration of agents who use the **Journey** tab, channels, and channel options for Predictive Engagement.

For more information about using the **Journey** tab in Agent Workspace, see Genesys Predictive Engagement Chat Interaction. For more information about setting up new agents and working with agent groups, see Scenario: Onboarding agents and supervisors and Manage agents and other users. To enable channels such as Chat for use with Genesys Predictive Engagement, see Enable Genesys Predictive Engagement for Chat and Channel options.

Integration with other products

You can integrate the Predictive Engagement service with other products to improve efficiency and facilitate lead generation. Currently, Genesys Predictive Engagement can integrate with the following:

- Architect workflows—Administrators and contact center managers can now create workflows in Genesys Cloud CX Architect. This feature allows customers to streamline business processes by using Predictive Engagement to build in-house and third-party integrations. For more information about Architect workflows, see Work with workflows.
- Trigger Architect flows: Predictive Engagement administrators can use an Architect flow action to configure action maps that trigger Architect flows that integrate with in-house and third-party systems. For more information, see About Architect flow actions.
- Create leads in Salesforce: Predictive Engagement facilitates an integration with Salesforce by providing predefined Genesys Cloud CX data actions and a sample Architect workflow. An administrator can build an action map that uses the Architect flow action, the data actions, and the Architect workflow to create leads and assign campaign attributions in Salesforce when qualified users arrive on your website. For more information, see Salesforce lead creation and campaign attribution.

Relevant information resources

For an introduction to Predictive Engagement, see the Genesys Predictive Engagement overview.

To familiarize yourself with Predictive Engagement terminology, see the Genesys Predictive Engagement Glossary.

The following sections provide links to documentation based on your role in the contact center.

Administrator

Administrators add the Journey JavaScript SDK (tracking snippet) to webpages and configure segments, outcomes, action maps, and so on, in the Genesys Cloud CX Admin UI. For more

information about how to configure Genesys Predictive Engagement, see the following documents:

- *Genesys Predictive Engagement Administrator's Guide*
- Genesys Predictive Engagement Administrator FAQs
- *Event tracking with tag managers*
- Required Genesys Cloud CX domains
- *Journey JavaScript SDK*

Developer

Developers integrate Genesys Widgets into the customer-facing website and can customize web tracking. For more information about how to perform these tasks, see the following documents:

- *Journey JavaScript SDK*
- Integration with Genesys Widgets; for the complete Genesys Widgets documentation, see Genesys Widgets.

Agent

Agents use the **Journey** tab in Agent Workspace to view journey information about customers who are using your website. For information relevant to agents, see Genesys Predictive Engagement Chat Interaction. The *Genesys Predictive Engagement Agent's Guide* provides detailed information about the Predictive Engagement features that an agent sees in Agent Workspace.