Genesys Engage On-Premises Use Cases

Genesys Messaging (CE34) for Genesys Engage on premises

2/11/2026

Offer a powerful new way for customers to connect with you directly in Messages

What's the challenge?

To engage customers on their devices, enable seamless experiences, build brands and reduce service and support costs using mobile messaging channels. Pain points include increased customer frustration due to failure of carrying context across channels and rising costs due to increased calls to agents.

What's the solution?

Using Genesys Messaging to support continuous, personalized conversations with integrated agent assistance and persistent history of contact, bringing new levels of scalability, consistency, and responsiveness to messaging interaction strategies

Other offerings:

Genesys Cloud

Contents

Use Case Overview

Story and Business Context

In today's digital world, telephone calls aren't always the best or desired way to communicate with businesses because they are not visual and require a synchronous live interaction. Consumers want a simple, convenient method of communication through the channel of their choice and according to their own schedule. Third-party messaging applications are a popular communication option that consumers have come to expect as a way to interact with companies.

Facebook Messenger, Apple Business Chat beta, and WhatsApp beta enable two-way conversations between consumers and businesses on familiar mobile devices and provide a feature-rich, flexible, and convenient method of answering questions, solving problems, and making purchases all through a single messaging conversation. The long-lived, asynchronous nature of the conversation means that the consumer and contact center agent can return to the conversation at any time with a full history.

This use case enables businesses to handle Messaging conversations in their Genesys contact center environment. Businesses must sign up with Apple or WhatsApp, choose Genesys as their customer service platform provider, and get their use cases approved by Apple or WhatsApp to be part of the ecosystem. There is no approval required for Facebook Messenger.

To increase successful self-service interactions, a chatbot can be used over these messaging channels to automate the conversation with the customer, providing the ability to seamlessly transfer to a contact center agent if and when needed. See use case Genesys Chatbots (CE31) for Genesys Engage on premises for details and limitations of incorporating chatbots with Genesys Messaging offerings. When companies enable Facebook Messenger, Apple Business Chat and WhatsApp as supported customer service channels within their Genesys environment, benefits can include:

- Improved first contact resolution and reduced handle time by matching every consumer with the agent best equipped to respond through skills-based routing

- Improved NPS by carrying context across channels and matching the consumer with an appropriately skilled agent, similar to how all Genesys channels are managed

- Reduced costs by granting agents the ability to manage multiple chat conversations simultaneously and blend messaging conversations with other media types in the same agent workspace

- Continuity in asynchronous conversations, enabling consumers to make contact when convenient throughout the day, week, or buying or service journey

- Workforce management and reporting integrated with the rest of the contact center

- Increased revenue and ease of purchase by leveraging Apple Pay (Apple Business Chat only)

- Improved brand perception by offering new channels that are expected to be heavily promoted by Apple and WhatsApp

- Convenience for consumers in using familiar messaging app as opposed to having to open a separate chat window

Use Case Benefits*

The following benefits are based on benchmark information captured from Genesys customers and may vary based on industry, lines of business or Genesys product line:

Use Case Benefits	Explanation
Improved Customer Experience	Carry context across channels and match the consumer with an appropriately skilled agent. Provide continuity in asynchronous conversations by enabling consumers to make contact when convenient throughout the day, week, or buying or service journey. Make it convenient for consumers by using familiar messaging apps as opposed to having to open a separate chat window.
Improved First Contact Resolution	Match every consumer with the agent best equipped to respond through skills-based routing while reducing handle time
Increased Revenue	Increase sales and ease of purchase by leveraging Apple Pay (Apple Business Chat only)
Reduced Administration Costs	Reduce costs by granting agents the ability to manage multiple chat conversations simultaneously and blend messaging conversations with other media types in the same agent workspace

Summary

A consumer can initiate a conversation with a business directly in Apple's Messages application, Facebook Messenger, or in WhatsApp. They do so by clicking on the chat message icon that appears when searching for a business on their iOS device using Safari, Apple Maps, Spotlight, Siri or a custom button for Apple Business Chat, by being presented with a button to connect to WhatsApp, or by searching for the business's Facebook page to initiate a chat conversation. These conversations are delivered to a company's contact center through the Genesys Messaging service. The conversation can be automated with a chatbot or human-assisted with a contact center agent. These engagements become persistent and long-lived (asynchronous), but can be handled live (synchronously) when necessary. During the conversation, the bot or agent can present rich messaging elements, such as Facebook Messenger Rich Messaging, Apple Business Chat list pickers, date pickers, URL previews, custom messaging extensions or WhatsApp Highly Structured Messages to offer feature-rich capabilities that make it convenient for the consumer to resolve their issue, get their question answered, or complete a transaction.
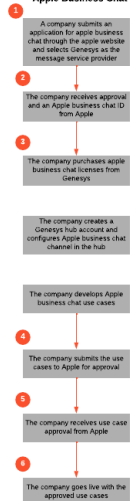
Use Case Definition

Business Flow

Approval Flow

Apple Business Chat

1. A company submits an application for apple business chat through the apple website and selects Genesys as the message service provider
2. The company receives approval and an Apple business chat ID from Apple
3. The company purchases apple business chat licenses from Genesys

The company creates a Genesys hub account and configures Apple business chat channel in the hub

The company develops Apple business chat use cases

4. The company submits the use cases to Apple for approval
5. The company receives use case approval from Apple
6. The company goes live with the approved use cases

WhatsApp

1. Brand is pre-approved by WhatsApp
2. The company purchases Genesys Messaging for WhatsApp
3. The company goes live with Genesys Messaging for WhatsApp

Facebook Messenger

1. The company purchases Genesys Messaging for Facebook Messenger
2. The company goes live with Genesys Messaging for Facebook Messenger
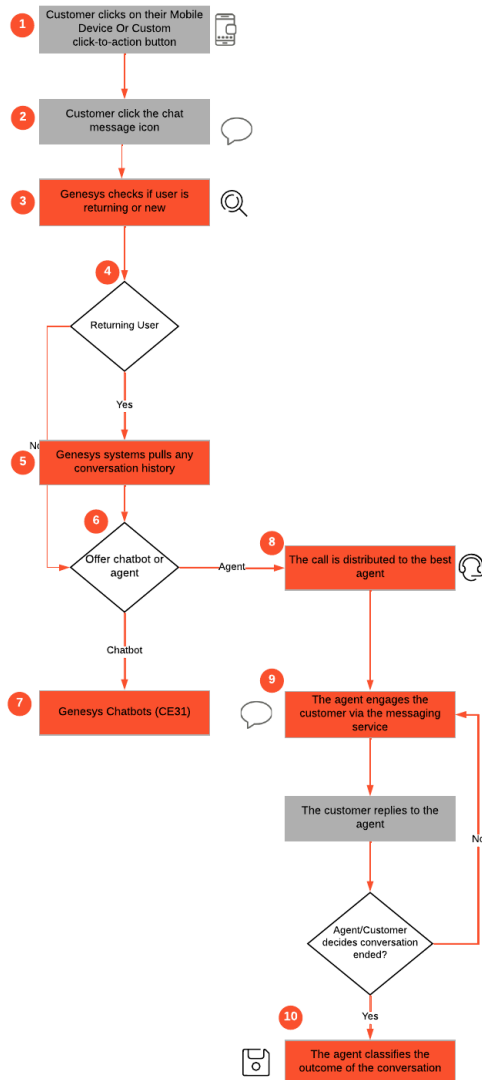
Business Flow Description

- If the brand was pre-approved by WhatsApp, they can engage with us to get on-boarded to Genesys. We can help with pre-approvals, but a brand should not assume they are pre-approved, because they expressed interest with us, or purchased Genesys Messaging for WhatsApp from us.
  * The company purchases Genesys Messaging for WhatsApp (including Hosting Fees and Incidental sellable item) from Genesys, uses the on-boarding guide to get their channels set up in Genesys Hub, and begins development of the messaging use cases.
  * The company can go live with Genesys Messaging for WhatsApp. While in beta, WhatsApp may want to check out the company's implementation before allowing them to go live.

- For Facebook Messenger there is no specific approval required. The steps for purchasing and going live with Facebook Messenger are the same as for WhatsApp.

Business Flow

Messaging Flow

Flowchart labels:

1. Customer clicks on their Mobile Device Or Custom click-to-action button
2. Customer click the chat message icon
3. Genesys checks if user is returning or new
4. Returning User
   - Yes
   - No
5. Genesys systems pulls any conversation history
6. Offer chatbot or agent
   - Agent
   - Chatbot
7. Genesys Chatbots (CE31)
8. The call is distributed to the best agent
9. The agent engages the customer via the messaging service
   - The customer replies to the agent
   - Agent/Customer decides conversation ended?
     - No
     - Yes
10. The agent classifies the outcome of the conversation

Business Flow Description

1. Apple Business Chat: Company invites the customer to initiate a conversation via messaging e.g via a custom Click to Action button in their app, on their website, or in an email. Facebook Messenger: the customer can initiate a Messenger Conversation through the official Facebook Page of the company)

2. Apple Business Chat: The customer clicks the chat message icon, and sends an initial message to begin the conversation. Facebook Messenger: The customer clicks on the "Send Message" icon on the Facebook official page.

3. The Genesys system checks to see if it can recognize the customer.

4. For brand new interactions, Apple passes an opaque customer ID to protect the customer's privacy until they are ready to share more information with the company. WhatsApp passes the phone number of the customer to help identify who initiated the conversation. Facebook passes a new PageScoped ID which is unique for a user, for a page.

5. For customers who have initiated a conversation previously, the system pulls the conversation history and presents it to the agent.

6. The Genesys system determines whether to offer an automated chatbot to the customer or route the customer to a contact center agent.

7. If a chatbot is offered, go to the use case .

8. If routed to an agent, the customer and agent begin a conversation.

9. Depending on the conversation topic, the agent can send the customer various interaction types in addition to text, emojis and images. For WhatsApp, Highly Structured Message templates (HSMs) can be sent to the customer (see below). For Facebook Messenger, Rich Media elements include Generic, Carousel, Media, and Button. For Apple Business Chat, additional rich media elements can be used by the agent:

Business and Distribution Logic

Business Logic

Users should never receive unsolicited messages and must have control over the conversation.

Important:

Apple Business Chat:

- As long as the conversation is ongoing in Messages, the brand can post to the user as often as they want. There are no published time limits for responses. This means that the brand could send 100 messages after receiving the first message from the consumer. We would advise brands to exercise caution, though, and not "spam" consumers or use it as an outbound solution; we expect providers to monitor this kind of behavior and eventually step in.

- The consumer can end the conversation in Messages by left-swiping and deleting the message, sending a "Close" command to Genesys. Once the conversation is closed, the system cannot send any more messages to the consumer.

WhatsApp/Facebook Messenger:

- A brand has 24 hours to respond to a consumer. Within that timeframe, bots and agents are allowed to send as many templated or free-form messages as they want. Any response by the consumer resets that 24-hour limit.

- WhatsApp: Once the 24-hour limit has expired, only paid WhatApp-approved template messages (called "paid notifications") can be sent until the consumer responds. Once the consumer responds, another 24-hour window opens for agents, bots and the consumer to communicate. Facebook Messenger: Only one message is allowed to be sent after the 24 Hour rule. This is called the 24h+1 rule.

- Paid notifications: WhatsApp charges for each notification sent based on the consumer's phone number. Their rate card is published on WhatsApp's website.

Distribution Logic

- For Apple Business Chat only, the links behind the chat button can include an Intent ID and/or Group ID, which can be used for routing purposes or to indicate a specific product configuration.

- With each conversation

  - Apple passes the consumer's language and device region, which can be used for routing purposes to the right agent.

  - WhatsApp passes the consumer's phone number that was used to send the message from, allowing the brand to identify the consumer.

- List Picker - to select one or more options from a list

- Date Picker - to make an appointment

- Apple Pay - to complete a transaction

- Deep Linking into company app for customer authentication purposes, invoking other capabilities already within the app, or for other reasons

10. Customer and agent interact via messaging service and after conversation is complete, agent dispositions the interaction.

For WhatsApp, the agent can also send pre-approved WhatsApp message templates. These can be free or paid.

- Using these interaction types can save time for the agent and reduce errors from the customer. Agents can choose these options from the standard response library so they don't have to assemble the pick lists on the fly.

- After the conversation between the agent and the customer, the agent can classify the chat for reporting purposes via the agent workspace.

User Interface & Reporting

Agent UI

Agents must have the following capabilities:

- Customer history is displayed to the agent upon interaction arrival. Agent can scroll back through previous conversations to initial interaction.
- Agent can send rich message elements, such as List/Date Picker, custom message extensions or Apple Pay inApple Business Chat, or paid notifications in WhatsApp.
- Agent can can send a message with Text, Emoji, and Image.
- Agent can receive a message with Text, Emoji, Image, Video, Audio, and Location.
- Agent can pivot to another channel and preserve the context of the interaction.

Reporting

Real-time Reporting

Genesys Pulse enables at-a-glance views of real-time contact center statistics through dashboards and wallboards.

Each Genesys Pulse report presents information within graphical widgets, which show graphs or tables that provide information about incoming voice call queues, agent groups, or individual agents. You can personalize Genesys Pulse reports based on functional, geographical, or organizational considerations.

Genesys Pulse provides templates for the most popular reports. You can use these templates to quickly add report widgets to your dashboards.

The following Genesys Pulse standard reports are particularly relevant for this use case:

- Chat Agent Activity — Presents agent or agent group activity as it relates to the processing of chat contacts.
- Chat Queue Activity — Allows you to monitor Chat Queue Group activity.
- Facebook Media Activity — Presents agent or agent group activity as it relates to the processing of social media interactions.

See Standard Report Templates for more information.

Historical Reporting

Genesys CX Insights (GCXI) provides customizable reports and dashboards that can help you track the benefits of this use case by analyzing historical data KPIs that provide intraday tracking.

Relevant reports for this use case are found in the Chat folder, notably:

- Interactions Acceptance Dashboard — Use this dashboard to understand how long it takes for agents to

accept customer interactions, and to identify what percentage of interactions are accepted promptly, or with some delay. Understanding interaction acceptance rate and speed can help you optimize agent performance and, by monitoring the time that customers wait before connecting to an agent, help to improve customer experience.

To use these reports to analyze messaging, filter the reports by Media Type to report on a specific channel (applebcsession, facebook, facebooksession, and/or whatsappsession), or all messaging channels.

See information about filtering data in a reports, see Understanding and using reports, and for additional information about GCXI, see the *Genesys CX Insights 9.0 User's Guide*.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

All of the following required:	At least one of the following required:	Optional	Exceptions
None	None	**Digital** • Genesys Social Media Routing (CE19) **Self-Service and Automation** • Genesys Chatbots (CE31)	None

General Assumptions

- Connects to Genesys Engage on-premises via Genesys Hub in the Cloud; no on-premise driver is available (this enables Genesys to keep the connections up-to-date without requiring customers to upgrade/install each time there are changes with third-party messaging apps).

- **Apple Business Chat**

    - Customer must get approval from Apple before they can use Apple Business Chat. Apple has to approve the brand first to get an Apple ID, and then they have to approve them again once the use cases have been developed before they can go live. Without both approvals, a customer cannot go live.

    - Companies may not proactively reach out to consumers through Apple Business Chat; the consumer must initiate the conversation.

- English-only for messages going through Apple Chat; other languages may work, but need to be tested as part of use case testing (limitation from Apple, not Genesys).

- No HIPAA compliance (limitation from Apple, not Genesys)

- The consumer has to initiate the first session. Such an initiation counts as an opt-in.

- **Whatsapp**

  - The brand must get approval from WhatsApp before they can use WhatsApp.

  - A brand can try to channel-switch a consumer by sending them an opt-in message or offering them a Call-to-Action. Interacting with these counts as an opt-in. Examples:

    - Click-to-action button on the brand's website

    - Link in email signature

    - Sending them an SMS with an offer to switch to WhatsApp

    - IVR offering to channel-switch to WhatsApp (need to check first whether the customer is on WhatsApp). Within 24 hours after the consumer contacted the brand, agents or bots can post to the consumer as often as they want.

    - After 24 hours, regular messages by agents or bots are rejected. Instead, the brand has to send a pre-approved notification message (called HSM, a.k.a Highly Structured Message) and the brand has to pay for the message. Paid messages are billed to Genesys, and Genesys bills the brand on a monthly message based on the rates published by WhatsApp. See WhatsApp Rate Card (rate card) and also WhatsApp's reference for additional (guidance) regarding what kind of messages are allowed.

Customer Responsibilities

For reference, here is a list of consumer-facing features that Apple supports. When using Genesys Messaging for Apple Business Chat, companies can leverage all of these.

- Keyboard shortcuts with intelligent suggestions for email address, phone number, postal address, and location.

- All standard Message attachment types like photos, videos, and documents.

- Built-in features to provide consistent experience for common use cases:

  - Time Picker - for scheduling appointments; exposes conflicting appointments in Calendar

  - List Picker - visual way to make a selection; user can select one or more depending on configuration

  - Apple Pay - easy and secure way to pay; for full checkout experience, user can also capture payment, shipping, and contact information

- iMessage Apps ("Deep Linking") - to customize experience beyond common use cases, companies can:

  - customize by extending Business Chat using the iMessage App Framework

  - pull in parts of the company app to appear like a message bubble within Messages

  - provide link to download app if consumer doesn't have it yet

- Live Message Layouts - companies can customize the look of the bubble, add map or live countdown, and add a simple form

- Consumers can Hide Alerts or Delete the message. Delete blocks all future messages from the company.

Facebook Messenger supports a rich messaging interface and companies can leverage these elements when using Genesys Messaging for Facebook Messenger. All standard Message attachment types like photos and videos.

- Agents will be able to add a tag (Human-Agent) to outgoing messages beyond the 24 hours window. This is not available for Bots.
- Inbound contact information.

Similarly, WhatsApp supports a rich messaging interface and companies can leverage these elements when using Genesys Messaging for WhatsApp. All standard Message attachment types like photos and audio attachments.

- Notifications to send predefined, WhatsApp-approved messages to consumers even when WhatsApp's regular response interval has expired.
- Inbound location and contact information
- Checking whether a contact is on WhatsApp, thus allowing a workflow to offer a channel switch to WhatsApp from a less desirable channel.

Related Documentation

Agent Workspace

The Agent Workspace lets contact center agents and supervisors communicate with customers and team members through phone calls and Outbound Campaigns and Genesys Digital channels.

- Agent Workspace 9 Help
- How Agent Workspace Works

Workspace Desktop Edition

Workspace lets contact center agents and supervisors communicate with customers and team members through phone calls and Outbound Campaigns and Genesys Digital channels.

- Workspace Desktop Edition Agent Help
- Workspace Desktop Edition User's Guide

- Contact history
- WhatsApp
- Chat

Document Version

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