Customer Service Automation Solutions Guide

Abstract

This document provides information about automating customer service on your website using bots, predictive chatbots, and blended Artificial Intelligence.

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2
Introduction to Customer Service Automation

The rapid increase in digital channels has led to more customer interactions, rising customer expectations, and a higher cost to serve. It's also become more difficult for businesses to understand customer needs across these channels and retrieve context from previous interactions, leading to a poor customer experience.

Customer service automation allows businesses to use automation and conversational AI (bots) to control the cost to serve and provide a personalized and contextual customer experience across voice and digital channels. It's about leveraging the right intervention on a customer's web journey at the right time and with the right technology. These technologies allow you to deliver a streamlined, personalized experience to your customers while reducing customer service costs. They allow you to identify which agent, bot, or combination of both best serves the customer and delivers better business outcomes.

Note: The Customer Service Automation Solution Guide doesn't provide detailed instructions for setting up, configuring, and deploying the automation components. For more information, see Appendix B: Resources.

Customer service automation helps to:
- Increase self-service rates by using the right bots for the task
- Improve agent routing accuracy through best-in-class intent and entity determination
- Provide a more conversational and personalized experience
- Speed up time to market through pre-built microapps
- Reduce total cost of ownership through an intuitive business user interface

The following technologies are available for PureConnect on-premises and cloud customers:
- **Bots** to handle tier one level questions, such as hours of operation or order status
- **Predictive chatbots** to offer assistance at key interaction points, such as when a customer is struggling to complete a task
- **Blended AI** to pass the interaction from a bot to a live agent, along with the context of the conversation

About bots

A bot is an AI engine that runs automated scripts to respond to messages received from a customer. Bots automate interactions to enhance the customer experience and provide basic answers, such as here’s your order and five things about it. Genesys supports a “design once, deploy anywhere” concept for bots to allow organizations to provide a seamless customer experience across voice and digital channels.

Bots support or orchestrate the following capabilities:
- **Personalization:** Tailors the experience based on context from the current interaction or previous interactions
- **Natural Language Understanding (NLU):** Derives intents and entities
- **Identification and verification:** Identifies and verifies the customer, if required
- **Directed Dialog:** Automates relevant business processes or provides information
- **Other NLU/AI platforms, such as Amazon Lex, Microsoft bot framework, IBM Watson, or Google Dialogflow:** Specializes in a specific topic
- **Handoff to an agent:** Connects the customer to a live person with the full context of the interaction

About predictive chatbots

A predictive chatbot is an AI engine deciding whether to offer a chat based on a customer’s behavior. For example, the customer keeps cycling through certain web pages or is possibly leaving the website. The difference with Genesys Altocloud and other predictive chatbots is that Altocloud makes algorithmic choices about the right moment to offer a chat; as opposed to a website where every page displays a chat message asking whether the website visitor wants to speak to an agent. Based on the visitor’s behavior on your website, the agent can say, for example, “It looks like you’re trying to schedule a Psychology class for your Nursing degree. I can help you with that.”

Genesys Altocloud monitors website behavior in real time, applies machine learning to determine audience segments and predicted outcomes, and then uses that information to guide website visitor’s to a successful outcome. Guidance starts with an effective self-service offer of a chatbot to those visitor’s who require assistance. Altocloud allows you to unlock data in real-time to engage customers proactively to eliminate the need for a voice call or contact without context.

About blended AI
Blended AI is the combination of automation, machine learning, and agents to handle website visitor inquiries. It allows you to seamlessly transition a visitor to an agent with full context so that the visitor doesn’t have to repeat information. For example, the bot can transition the interaction to an agent when the website visitor has a complex question that the bot cannot answer.
Customer Service Automation Uses

The following table lists customer service automation interaction types and usage examples.

<table>
<thead>
<tr>
<th>Interaction Type</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Real-time queries</td>
<td>• FAQs</td>
</tr>
<tr>
<td></td>
<td>• Account balance</td>
</tr>
<tr>
<td></td>
<td>• Hours of operation</td>
</tr>
<tr>
<td>Transactions</td>
<td>• Bill payment</td>
</tr>
<tr>
<td></td>
<td>• Product or service ordering</td>
</tr>
<tr>
<td></td>
<td>• Guided technical support</td>
</tr>
<tr>
<td>Business processes</td>
<td>• Address updates</td>
</tr>
<tr>
<td></td>
<td>• Password resets</td>
</tr>
<tr>
<td></td>
<td>• Callback scheduling</td>
</tr>
<tr>
<td>Routing</td>
<td>• Agent</td>
</tr>
<tr>
<td></td>
<td>• Channel (chat, email, SMS, phone)</td>
</tr>
<tr>
<td></td>
<td>• Another bot</td>
</tr>
</tbody>
</table>

Scenarios

The following table lists example scenarios for when to use predictive chatbots only, predictive chatbots plus a bot, or bots only.

<table>
<thead>
<tr>
<th>Use...</th>
<th>When you want to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Predictive chatbot</td>
<td>• Intervene before a customer leaves a web page and offer the opportunity to speak to an agent</td>
</tr>
<tr>
<td></td>
<td>• Intervene when a customer appears to be struggling with your website and offer the customer the opportunity to speak to an agent</td>
</tr>
<tr>
<td>Predictive chatbot plus a bot</td>
<td>• Intervene when a customer searches for instructions on completing a task and offer a chatbot</td>
</tr>
<tr>
<td></td>
<td>• Intervene when a customer is struggling to submit a request and offer a chatbot to gather basic information before transferring to an agent</td>
</tr>
<tr>
<td>Bot</td>
<td>• Present an always-available bot that allows customers to get answers to frequently asked questions</td>
</tr>
<tr>
<td></td>
<td>• Present an always-available bot that provides customers with assistance in completing a task</td>
</tr>
</tbody>
</table>
Customer Service Automation Benefits

Automating the handling of routine queries and optimizing interactions reduces operating costs and improves the customer experience, customer satisfaction, and agent satisfaction.

**Improved customer experience**

- 24-hour service
- Shorter wait times
- Faster resolutions
- Immediate options
- Improved outcomes
- Assistance only when needed
- Interactions tailored to the customer based on who they are, why they might be interacting, and the status of the contact center

**Reduced administration costs**

- Right information at the right time
- Automated conversation
- Lower support costs
- Ability to handle an unlimited number of chats simultaneously
- Reduced agent-assisted interactions for repetitive or common requests
Integration Components

Bots

Genesys bots are easy to design using Dialog Engine and configure the bot conversation flow using Genesys Intelligent Automation or Interaction Designer. You can deploy bots across any channel using Genesys Intelligent Automation. Genesys also has an open AI platform that allows you to use third-party bots or bots that your organization created.

A bot is flexible; it can solve today’s problems and flex tomorrow’s problems. You can:

- Change the media layer, such as web chat, voice bot, or Facebook Messenger bot
- Change the set of tasks, such as having three response choices when a customer mentions "order", or having one response when a customer mentions "hours"
- Change the bot "brain" (NLU, NLP, blended AI)

Genesys native bots use Genesys Dialog Engine for NLP and either Genesys Intelligent Automation or Interaction Designer for the conversation flow.

For more information, see the following:

- Genesys Dialog Engine User Guide
- PureConnect Integration with Genesys Intelligent Automation Technical Reference
- Interaction Designer Help

Genesys Altocloud

Genesys Altocloud integrates with Interaction Connect to support PureConnect Cloud and PureConnect on-premises customers. It’s hosted in the Genesys Cloud and determines when to offer a chat to a website visitor and which agent workgroup should handle the interaction based on current agent availability. Altocloud uses Genesys Widgets to start predictive engagement web chats with website visitors. Once a chat connects to an agent in Interaction Connect, the agent can view a map that outlines the visitor’s journey on the website.

For more information, see the following:

- PureConnect Integration with Altocloud Technical Reference
- Interaction Connect Help
- Altocloud (for PureConnect) in the Resource Center

Genesys Widgets

Genesys Widgets are Java Script-based, cloud-hosted, and cloud-configured extensions that implement the Genesys Widgets API under a continuously integrated and deployed release model. For example, the Web Chat widget displays a user interface within a web page to allow a customer to start a live chat with an agent.

Interaction Connect supports the configuration and deployment of Genesys Widgets using code snippets that you include in your website. Configuring and deploying Genesys Widgets does not require developer skills.

For more information, see the following:

- Interaction Connect Help
- Genesys Widgets Reference (commands, events, configuration, and localization details)

Microapps

Genesys Intelligent Automation offers over 80 pre-built, configurable microapps that accomplish specific tasks, such as payment capture, and deploy across all channels, consistently and quickly. You can combine microapps to create fully personalized AI to drive dialogues in a chat session for a seamless customer and agent experience.

For more information, see the following:

- PureConnect Integration with Genesys Intelligent Automation Technical Reference
- Genesys Intelligent Automation Microapps Catalogue
**Note:** The PureConnect integration with Genesys Intelligent Automation only supports the microapps listed in the **Business Processes** section in Genesys Intelligent Automation.
Interaction Security

Interactions pass securely from your website through a cloud service to Genesys Intelligent Automation on-premises, cloud, and hybrid implementations.

The cloud service uses the following security measures:

- Follows microservices industry standards.
- Uses HTTPS with TLS 1.2 to encrypt and protect all data in transit and at rest.
- Encrypts all data on AWS, whether going through a cache or messaging bus.
- Caches data during current session only; no data retained in the cloud service and nothing stored.
- Uses stateless service.
Licensing Requirements

Following are the licensing requirements for the customer service automation solution.

Genesys Intelligent Automation licensing

The following table lists the licensed components for Genesys Intelligent Automation.

<table>
<thead>
<tr>
<th>Component</th>
<th>Part/Description</th>
<th>Sold by</th>
<th>Pre-required Part</th>
</tr>
</thead>
<tbody>
<tr>
<td>Genesys Intelligent Automation Omnichannel Self Service</td>
<td>Provides a web-based design tool for dialog flows, including reusable microapps for common dialog tasks. It also provides a dynamic runtime environment that generates VoiceXML for interactions over the voice channel.</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Cloud Voicebot / Chatbot</td>
<td>VoicebotMin-PCC, Voicebot Minutes</td>
<td>Voice bots sold by the minute</td>
<td>VXML Server</td>
</tr>
<tr>
<td></td>
<td>VoicebotIntxn-PCC, Voicebot Interactions</td>
<td>Voice bots sold by the interaction (complete bot – customer conversation)</td>
<td>VXML Server</td>
</tr>
<tr>
<td></td>
<td>CS-ChatbotOrch, Chatbot Interactions</td>
<td>Chatbots sold by the interaction (complete bot – customer conversation)</td>
<td>N/A</td>
</tr>
<tr>
<td>Premise Voicebot / Chatbot</td>
<td>VoicebotMin-PCP-Sub, Premise (Subscription)</td>
<td>Voice bots sold by the minute</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td>VoicebotIntxn-PCP-Sub, Premise (Subscription), Voicebot Interactions</td>
<td>Voice bots sold by the interaction (complete bot – customer conversation)</td>
<td>VXML Server</td>
</tr>
<tr>
<td></td>
<td>CS-ChatbotOrch-SUB, Premise (Subscription), Chatbot Interactions</td>
<td>Chatbots sold by the interaction (complete bot – customer conversation)</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Note: For voice bots, select the pricing model and either part 1 or part 2. For chatbots, there is only one pricing model.

Genesys Altocloud licensing

<table>
<thead>
<tr>
<th>Part</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>I3_FEATURE_ALTOCLOUD</td>
<td>Turns on the integration for the CIC server.</td>
</tr>
<tr>
<td>I3_ACCESS_ALTOCLOUD_USER</td>
<td>Allows an agent to receive interactions from Altocloud.</td>
</tr>
</tbody>
</table>
For more information, see the following:

- PureConnect Licensing Technical Reference
- Interaction Administrator Help
## Component Requirements

### Genesys components

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intelligent Automation VUI Server</td>
<td>Server for the Intelligent Automation engine to process dialog flows.</td>
</tr>
<tr>
<td>Intelligent Automation GUI Server</td>
<td>Server for the intelligent design tool for creating and maintaining self-service dialog flow in Intelligent Automation.</td>
</tr>
<tr>
<td>Intelligent Automation Integration Server</td>
<td>Server to invoke and parse external web service requests from within the Intelligent Automation VUI server.</td>
</tr>
<tr>
<td>CIC</td>
<td>Integrated contact center software solution.</td>
</tr>
<tr>
<td>Media Server</td>
<td>Server for delivering audio streaming services and interfaces to third-party Text-to-Speech (TTS) and Automated Speech Recognition (ASR) engines.</td>
</tr>
<tr>
<td>Common Microservices Cloud</td>
<td>Service that provides chatbot capabilities from the cloud by orchestrating connectivity between Widgets, CIC, and Intelligent Automation.</td>
</tr>
<tr>
<td>Genesys Widgets</td>
<td>Customizable, extensible chat interface for customer deployment. Works with Common Microservices Cloud.</td>
</tr>
</tbody>
</table>

### Third-party components

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>TTS Engine</td>
<td>Optional Text-to-Speech (TTS) engine that can play back dynamic types of data, such as names and addresses, that aren't represented using audio files. It also allows administrators to create prompts without a traditional recording studio.</td>
</tr>
<tr>
<td>UniMRCP</td>
<td>System that allows Media Resource Control Protocol (MRCP)-based systems to communicate with non-MRCP-based TTS and Automated Speech Recognition (ASR) engines.</td>
</tr>
<tr>
<td>Google Speech API</td>
<td>Cloud speech transcription system that reflects exactly what the caller said rather than using the grammar-based system that traditional ASRs use.</td>
</tr>
</tbody>
</table>
Configuration and Deployment

Following is a high-level overview for configuring and deploying chatbots, widgets, and Altocloud to your organization’s website.

Chatbot design

Design a chatbot in Genesys Dialog Engine and specify the following:

- **Domain**: Area of expertise in which your chatbot to operate.
- **Intents**: Goal or task that a website visitor is trying to accomplish, such as track a package or book a cab.
- **Utterances**: Phrases that a website visitor might use to describe their intent. For example, “I want to book a cab for 6 pm today.”
- **Entities**: Information that is relevant to the website visitor’s intent. For example, “I want to book a cab for 6 pm” could have a transportation type entity (cab), a time entity (6 pm), and a date entity (today).
- **Slots**: Pieces of information that the chatbot can derive from an utterance and map to an entity.
- **Confirmations**: Message that the chatbot sends to the website visitor to confirm the visitor’s intent.
- **Default welcome message**: Default message to display to the website visitor.

For more information, see [Creating your first Chat Bot](#).

Note: You can also design a chatbot using a tool of your own choosing, or deploy a ready-made third-party bot to your organization’s website.

Chatbot conversation flow

Configure the chatbot conversation flow in Genesys Intelligent Automation and specify the following:

- **Blocks**: Individual steps in a call flow that accomplish a single function. For example, a Start block signals the start of a chat.
- **Paths**: Lines that connect blocks to indicate the path to follow in a call flow. For example, a “yes” path links to one block and a “no” path links to another.

For more information, see the [Genesys Intelligent Automation Help](#).

Note: You can also create handlers using Interaction Designer to configure a chatbot conversation flow. For more information, see the [Interaction Designer Help](#).

Widget configuration

The first step to integrate a bot with Interaction Connect is a one-time configuration of a chatbot widget in Interaction Connect. Following are the available options:

- **General configuration**: Configure the widget as a whole, such as theme, language, and the IC server.
- **Plugin configuration**: Configure the type of widget to use for the integration.

<table>
<thead>
<tr>
<th>Widget Plugin</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Chat widget</td>
<td>Allows a website visitor to start a live chat with an agent. The widget then creates a chat interaction and routes it to the appropriate queue.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong>: If you are using Altocloud, you don’t need this widget.</td>
</tr>
<tr>
<td>Chatbots widget</td>
<td>Indicates which chatbot provider to use: either Genesys Intelligent Automation or a third-party vendor. For more information about supported third-party providers, see <a href="#">Appendix A: Supported Third-party Bot Providers</a>.</td>
</tr>
</tbody>
</table>

Note: For more information about other Genesys Widgets plugins, see the [Interaction Connect Help](#).

- **Extensions**: Associate any extensions (for example, plugins or widgets) that your developers created for the widget. For more information about creating extensions for Genesys Widgets, see the [Genesys Widgets Reference](#).
- **Unrestricted properties**: Specify any properties that you want to allow supervisors to configure within their Widgets view, such as low-risk properties directly related to their jobs.
Widget deployment

The second step to integrate a bot with Interaction Connect is to deploy the widget to your organization’s website. In Interaction Connect, generate a JavaScript snippet of the widget and then copy it to the appropriate page in your website.

For more information about widget deployment, see the Interaction Connect Help.

Genesys Altocloud configuration

The first step to integrate it with Interaction Connect is to configure Altocloud and then configure a widget in Interaction Connect.

- **Altocloud configuration**: Configure various settings, such as the ability for Altocloud to receive workgroup updates from PureConnect to determine agent availability; and segments (optional), outcomes (optional), and action maps.
- **Interaction Connect configuration**: Complete the general configuration of a widget as mentioned in the Widget configuration section.

For more information about Altocloud configuration, see the PureConnect Integration with Altocloud Technical Reference.

Genesys Altocloud deployment

The second step to integrate Altocloud with Interaction Connect is to deploy the Altocloud tracking and the widget code snippets to your organization’s website.

- **Altocloud tracking snippet**: In Altocloud, generate the tracking snippet and then copy it to the appropriate page in your website.
- **Widget snippet**: In Interaction Connect, generate a JavaScript snippet of the widget and then copy it to the appropriate page in your website.

For more information about Altocloud deployment, see the following:

- Altocloud Administrator’s Guide
- Interaction Connect Help
**Business Flows**

**Chatbot Flow**

Following is the business flow for a chatbot:

1. Website visitor starts a chat or Altocloud offers a chat.
2. Chatbot retrieves visitor information from:
   - Genesys user data from Altocloud Segment or the website passed by Genesys Widgets
   - Journey context from Altocloud or customer journey data
   - API call to third-party data source
   - Website visitor receives a personalized message or menu, or the chatbot transfers the visitor to an agent. Examples include:
     - Custom message or update, such as "Your next order is due for delivery on Thursday before 12."
     - Most likely contact reason, such as "Do you want information about your loan application?"
     - Tailored menu with most likely options, such as 'Main menu. You can choose Balance, Payments, or Orders.'
     - Self-service task, such as loan application, based on Segment that Altocloud provided or other attached user data
   - Website visitor transfers directly to an agent because of an outstanding balance, or the visitor requests a callback
   - If the chatbot doesn’t transfer the interaction to an agent, the website visitor can end the chat session, confirm the contact reason, or continue

Assuming that the website visitor moved on from the personalization stage, the chatbot asks an open-ended question (such as, "How may I help you?") to determine intent and capture the visitor’s response. (BL3)

The chatbot sends the website visitor’s response to Genesys Dialog Engine (or, optionally, a third-party NLU engine through an API call). (BL1-BL4)

- If Dialog Engine or the third-party NLU engine returns the intent and entities, the conversation moves to the correct point in the interaction flow, which could be within one of the following sub-flows (or microapps):
  - Identification and verification
  - Automated business process (such as payment collection microapp)
  - Hand-off to live agent or request a callback
- If Dialog Engine or the third-party NLU engine doesn’t return the intent and entities, the chatbot returns a retry message, such as, "Sorry, we didn’t understand your question. Please ask another question or reply AGENT for live assistance."

Upon completion of a task, the chatbot asks a follow-up question, such as "Is there anything else I can help you with?" (BL2-BL3)

- If the website visitor responds "yes," the chatbot returns the visitor to step 5 ("How may I help you?")
- If the website visitor’s response is "no," the chatbot determines whether to offer a survey
- If the website visitor responds with a more advanced answer, the chatbot sends the response to Dialog Engine (or, optionally, a third-party NLU engine through an API call) to determine intent and entities for further processing

The chatbot retrieves website visitor information and context to determine whether to offer a survey. (BL5) Sources include:
- visitor profile information available in PureConnect, API call to third-party data source, or logic defined in Genesys Intelligent Automation
- If offering a survey, the chatbot continues to the next step
- If not offering a survey, the chatbot continues to the final step

The chatbot asks whether the website visitor wants to participate in the survey.
- If the visitor’s response is "yes," the chatbot continues to the next step to allow the customer to engage in a survey
- If the visitor’s response is "no," the chatbot continues to the final step

The chatbot presents a survey to the website visitor that your organization can create using the Genesys Intelligent Automation Questionnaire Builder microapp.
- The chatbot presents a concluding message and ends the chat.

---

**Business logic**

**BL1: Agent hand-off**
The website visitor can ask the chatbot to connect them to an available agent. The chatbot disconnects and the chat transcript (excluding sensitive data) displays on the agent desktop. Other context can also display as case data.

**BL2: Retries**

Your organization can configure the number of retries for self-service tasks and questions, and the action to take upon reaching the maximum number of retries. For example, upon reaching the maximum retries, you can have the chatbot present a message, transfer the interaction to an agent, or offer a callback (if the agent is busy or the interaction is occurring outside normal business hours).

**BL3: Response Type**

Your organization can configure the interaction flows to accept natural language responses and closed responses, such as account number, date of birth, and yes/no answers. This feature allows website visitors to backtrack to a different point in the dialogue when required. For example, if a visitor is midway through making a payment and says, “actually, just tell me where your nearest branch is,” the chatbot displays information about the nearest branch.

**BL4: Callback**

If outside normal business hours, or the estimated wait time is high, the chatbot can offer an immediate callback. If you didn’t configure this option, the chatbot displays a message indicating that a transfer is not possible.

**BL5: Survey**

Your organization can determine whether to present a survey, based on:
- Genesys user data from Altocloud Segment or the website passed by Genesys Widgets
- Journey context from Altocloud or customer journey data
- API call to third-party data source
- Internal logic
Predictive Chatbot Flow

Following is the business flow for a predictive chatbot:

1. The website visitor starts browsing on your website.
2. Genesys Altocloud determines whether the website visitor is a new or returning visitor, and associates data from previous journeys. [BL1]
3. The combination of segment and variations in outcome score can trigger Altocloud to offer a chat to the website visitor. [BL2, BL3]
4. If the website visitor accepts the invitation for chat, a registration form displays and the conversation with the chatbot starts. In the registration form, the website visitor can type their contact details (for example, name and email) or, if already known, the chatbot can populate the contact details. [BL4]

Business logic

BL1: Customer Identification

Genesys Altocloud can detect a returning website visitor using cookies and associate previous site visits to the visitor. Altocloud can capture identity information submitted during the journey (for example, email address or phone number) and use it to identify the visitor, even across devices. If a website visitor uses a second device to visit the website the next day and provides a piece of this information, Altocloud can associate this new visit to the previous journeys across devices.

When Altocloud cannot determine the website visitor's identity, it treats the visitor as an anonymous visitor and attaches all tracking data to this anonymous visitor. When Altocloud identifies the visitor, it associates all tracking data collected to that specific visitor. Altocloud collects website visitor data according to General Data Protection Regulation.

BL2: Segment and Outcome Configuration

Segments are a way to categorize visitors on your website based on common behavior and attributes. You configure segments in Altocloud. A segment can consist of one or both of the following components:
- Attributes, such as browser type, device type, location, UTM parameters, or the referral website
- Journey Pattern, such as website browsing behavior, website searches, items clicked, cart abandonment, or repeat visits

Outcomes are goals that you want your visitors to achieve on your website. You configure outcomes in Altocloud. Typical outcomes include:
- Check order status or return status
- Open or check status of trouble ticket
- Locate warranty or return policy

BL3: Action Map Configuration

Action Maps determine how to engage with a website visitor. Within action maps, you define the triggers that result in an action to the visitor. You can base triggers off any combination of the following:
- Segment (who the visitor is)
- Visitor activity
- Outcome probability score (typically, a drop in the score for a specific segment can trigger a chatbot offer)

BL4: Customer Invite and Registration Window

You can use Genesys Widgets for the following:
- Send invite messages for chatbot
- Collect visitor's contact details
- Engage over chat session

Agent Chat Flow

Following is the business flow for an agent chat:

1. The website visitor requests to chat with a live agent.
2. The Genesys Chat Widget checks whether agents are available, logged on, and (using Genesys APIs) checks the wait time to make intelligent decisions as to when to offer the chat feature to website visitors.
   - If no agents are logged on, the chat disconnects and the website visitor receives a disconnect message.
   - If agents are logged on, chat routing occurs.
   - The chat window opens.
   - The website visitor receives a welcome message from the chat widget.
   - The chat widget searches for an available chat agent.
     - If no agent is available, the chat interaction sits in queue until an agent becomes available. Your organization can configure the wait time and the option for the website visitor to leave a chat voice mail during the wait time.
     - If the website visitor ends the chat session, the business flow ends.
     - If the final timeout is reached, the chat widget informs the website visitor and ends the chat ends. The business flow ends.

   - When the chat request routes to an agent, the agent can either accept or ignore the chat interaction. If the agent does not accept the chat interaction, the chat widget attempts to route the interaction to another agent after reaching a specified timeout. The first agent’s status changes to not ready (Did Not Answer).
   - If the agent accepts the chat interaction, the chat widget establishes a chat session between the agent and the website visitor. The agent sees the full chat session and context within the desktop. The agent can use standard responses based on the workgroup for the chat interaction.
   - When the chat session ends, the agent can set a disposition code to register the outcome of the chat for reporting purposes.
   - The website visitor can print a transcript of the chat session. Also, with the optional Interaction Recorder license, visitors can receive an email with a transcript of the chat session.

**Business logic**

Business logic and rules determine the distribution of chat requests and the standard responses agents can use. Distribution depends on a combination of agent skill and availability.

**Distribution logic**

The following table lists the parameters that your organization can configure.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skill</td>
<td>Required agent skill for distribution of the chat message:</td>
</tr>
<tr>
<td></td>
<td>- Required minimal skill level for the first target group of Min Skill level 1 agents</td>
</tr>
<tr>
<td></td>
<td>- Required maximum skill level for the first target group of Max Skill level 1 agents</td>
</tr>
<tr>
<td>Idle Time Warning</td>
<td>Warning message to display when the website visitor hasn't communicated for a specified time period.</td>
</tr>
<tr>
<td>Idle Time Disconnect Message</td>
<td>Final message to display when reaching the idle time limit.</td>
</tr>
<tr>
<td>Disconnect Message</td>
<td>Message to display when no agents are logged on for this service.</td>
</tr>
<tr>
<td>Welcome Message</td>
<td>Message to display when the chat session starts.</td>
</tr>
<tr>
<td>Wait Time</td>
<td>Message to display when the website visitor first connects.</td>
</tr>
<tr>
<td>Position in Queue</td>
<td>Message to display when the website visitor first connects.</td>
</tr>
<tr>
<td>Option to Leave a Chat Voice Mail</td>
<td>Message to display when the website visitor first connects.</td>
</tr>
<tr>
<td>Chat Transcript</td>
<td>Option to offer the website visitor the opportunity to print the chat transcript.</td>
</tr>
</tbody>
</table>

**Standard responses**
In the response library window, the workspace displays suggested responses to the agent based on keyword searches. Your organization configures standard responses for specific scenarios or steps of the chat flow.

**Operational hours**

Configure operational hours on your website. Don't display the agent chat initiation functionality to website visitors outside normal business hours.

**Other functionality**

Following is other functionality for the distribution logic:
- Distribution logic looks for agents with the requested skill and a skill level within the boundaries of minimum and maximum required skill levels.
- Skill; minimum and maximum skill levels; and timers configurable by subject.
- Reroute on "no answer" functionality. If an agent does not accept the chat interaction, the chat interaction returns to the distribution flow after a timeout. The agent status changes to "Agent Not Answering."
- Blending with other media types is possible. Priority settings for chat interactions are configurable to allow proper priority ranges between different media types. Your organization can configure utilization rules for the agents or agent groups to define which interactions (if any) that they can handle in parallel.
Website and Interaction Connect Views

Chat view on your organization's website

A website visitor can accept an offer from a chatbot to engage in a chat.

Following is an example of using a Genesys Chat Widget on your organization's website. It's configured to:
1. Always present a chat window to the website visitor.
2. Request preliminary information from the visitor.
3. Display a chat window to allow the visitor to engage in conversation with the chatbot.

Agent's chat view in Interaction Connect

A chat can transfer to an agent when a customer requests it, or through an automated process flow. The transfer includes the context (requested subject). When an agent picks up the chat from the My Interactions queue in Interaction Connect, the Current Interaction view opens to allow the agent to chat with the customer.

Agent's Altocloud view in Interaction Connect

During a single website visit, a website visitor might click various options, visit several web pages, and provide some data. At a predefined point in the visitor's journey (that your organization configures), Altocloud offers the visitor the option to chat with an agent. If the visitor accepts the chat offer, Altocloud routes the chat to the most qualified and available agent. When the agent picks
up the interaction, the **Current Interaction** view displays in Interaction Connect to allow the agent to chat with the visitor. The agent can then open the **Altocloud** view to see information about the visitor’s website journey.

![Interaction Connect and Altocloud views](image)

The **Altocloud** view displays the following:

- **Visitor information**, including name, status, and number of visits to your website.
- **Visit information**, including date, time, and duration.
- **Visit journey map** that displays the visitor’s route through your website.
- **Searches** that the visitor carried out.
- **Segments** assigned to the visitor, which represent a group of visitors with common characteristics or behaviors.
- **Outcome scores** that indicate how a visitor is progressing toward business goals that your organization established.
- **Other information**, including the visitor’s location, device type, operating system, and browser type.
Reporting

Bot reporting

<table>
<thead>
<tr>
<th>Real-time</th>
<th>Historical</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Chat interactions waiting in the system</td>
<td>Number of conversations that occurred over a specific time period.</td>
</tr>
<tr>
<td>Total Chat interactions</td>
<td>Maximum, minimum, and average length of time for each conversation.</td>
</tr>
<tr>
<td>Agent Group Status</td>
<td>Number of unique customers or contacts and number of repeat customers or contacts.</td>
</tr>
</tbody>
</table>

Altocloud reporting

Real-time

- Action Maps Analytics report for determining the effectiveness of your action maps. For more information, see the Altocloud Administrator’s Guide.
- Visitor Activity report for monitoring how customers use your website. For more information, see the Altocloud Administrator’s Guide.
Appendices

Appendix A: Supported Third-party Bot Providers

The Genesys AI platform supports the following third-party NLU and bot platforms:

- Microsoft bot framework
- IBM Watson
- Amazon Lex
- Google DialogFlow

Third-party bot integration requirements

- IC server running CIC 2019 R1 Patch 5 version or later.
- Interaction Connect version 2019 R1 Patch 5 or later.
- Bot Gateway
- Genesys Widget framework on web and mobile web (only for chat)
- Genesys Intelligent Automation
- Applicable licenses
Appendix B: Resources

Altocloud

- [Altocloud Integration landing page](#)
- [Altocloud for PureConnect](#)

Bots

- [Genesys Dialog Engine User Guide](#) (Genesys bot creation)
- [Genesys Intelligent Automation Help](#) (Bot conversation flow setup)
- [Interaction Designer Help](#) (Bot conversation flow setup using handlers)

Genesys Intelligent Automation

- [PureConnect Integration with Genesys Intelligent Automation Technical Reference](#)
- [Genesys Intelligent Automation Deployment Guide](#)
- [Genesys Intelligent Automation Help](#)
- [Genesys Intelligent Automation Reference Guide](#)

Genesys Widgets

- [Interaction Connect Help](#)
- [Genesys Widgets Reference](#) (Commands, events, configuration, and localization details)
- [Genesys Widgets Deployment Guide](#)

Licensing

- [PureConnect Licensing Technical Reference](#)
- [Interaction Administrator Help](#)

Microapps

- [PureConnect Integration with Genesys Intelligent Automation Technical Reference](#)
- [Genesys Intelligent Automation Microapps Catalogue](#)
Change Log

The following table lists the changes to the *Customer Service Automation Solution Guide* since its initial release.

<table>
<thead>
<tr>
<th>Date</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>08-August-2019</td>
<td>Initial release.</td>
</tr>
</tbody>
</table>
