



Business Chat Getting Started Guide

September 2018.3

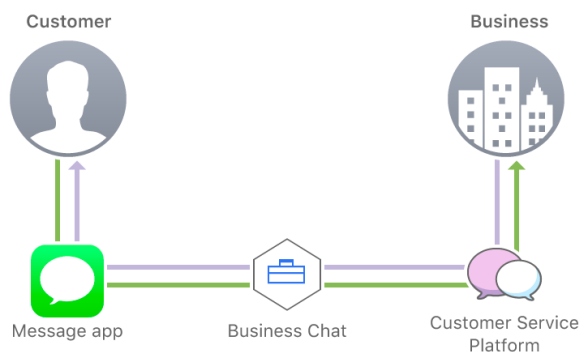
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Business Chat Overview

Business Chat is a service that allows your organization to chat directly with your customers using the Messages app. You can also use the full power of the iMessage framework to help your customers resolve issues, schedule appointments, make purchases, or make payments with Apple Pay. Depending on your configuration, your customers are able to find your business and start a conversation from within Siri, Safari, Search, Maps, your website, and iOS app.

Through [Apple Business Register](#), you can create Business Chat accounts and Customer Service Platform (CSP) accounts. These are the two main components of the Business Chat feature. Business Chat Accounts are used for businesses who can connect to the Apple Business Chat server through a CSP. As shown below, a CSP account allows a messaging service provider to connect their platform to the Business Chat server. This enables their business clients to respond from their agent desktop to customer messages sent from the Messages app on iOS 11.3 and later and macOS 10.13.4 and later.



The onboarding steps for both Business Chat Accounts and CSP providers requires an Apple review at different points in the process. While Apple is reviewing your progress, you can start planning your Business Chat solution. If you are registering for a Business Chat Account, research your business needs and provide an adequate process plan that identifies and authenticates your customers within Business Chat, to your CSP. As a CSP, you can follow the [Business Chat API Integration Tutorial for CSPs](#) using the [Sandbox](#) and learn more about the Business Chat features, understand the data exchange protocols, and get hands-on with Business Chat in a testing environment.

Apple recommends that you follow [Business Chat Policies and Best Practices](#) for your business to ensure a positive customer experience using Business Chat.

Qualifying as a Business

To qualify for a Business Chat Account (BCA) you must have an asynchronous messaging platform staffed by live agents during business hours. Your business must either use one of the providers who have an Apple-authorized CSP account or your business must have an internal custom messaging platform for your live agents. For a custom messaging platform, you must be provided with a URL from your CSP.

In addition, your business must be willing and capable of offering comparable service to your customers over Business Chat that it is currently provided over your telephone support line.

Qualifying as a Customer Platform Service Provider

To qualify for a commercial CSP account your platform must support asynchronous messaging with live agents. All systems must be able to send and receive messages with the Business Chat server. Your platform is also expected to have the capability to determine customer intent, queue and prioritize messages, route messages to the appropriate agent or group of agents, and send and receive messages and app content to your clients' customers using the Business Chat service.

Operationally, you must be capable of assisting your business clients to be *launch ready* for Business Chat. Launch ready means that your business clients must be capable of resolving all customer queries that are regularly resolved over their telephone support line. In addition, your business clients must have created a Business Chat experience for each of the top 20 reasons that customers contact them. You must be capable of providing technical support and guidance in integrating their apps and business services with your platform.

Assigning Roles to Your Team Members

Before you begin your organization registration, assign the roles below to a team member. It is recommended that you have more than one team member for each role. Each team member assigned a role must have an [Apple ID](#) that uses your organization's email, see [Create an Apple ID](#).

- **Administrative contact:** An employee that an Apple Business Register representative can contact for technical issues. The administrator can also register the business using Business Register. It is recommended to have two administrative contacts for redundancy.
- **Technical contact:** An employee that an Apple Business Register representative can contact for technical issues.
- **Sponsoring executive:** A senior member of your team responsible for overseeing your Business Chat project to agree to the Terms of Use (TOU).

Registering for Business Chat

To register your organization you need to assign team members the roles of administrator and sponsoring executive. It is recommended that you designate more than one team member to the roles needed to complete the onboarding process. These roles are designated during the registration process.

The complete organization onboarding process, including applying for either Business Chat Accounts or Customer Service Platforms (CSPs), requires actions from an administrator, a technical contact, and a sponsoring executive. The administrator uses Apple Business Register to register the organization and approve the TOU on behalf of the sponsoring executive, the technical contact can set up Business Chat Accounts, CSPs, and Brands, and the sponsoring executive agrees to the TOU. You should have these program contact roles identified prior to registration. See [Assigning Roles to Your Team Members](#).

The first step in onboarding your organization, whether you are a business or a CSP provider, is to ensure you and your team members have an Apple ID using your organization's email address.

1. **Create an Apple ID.** An Apple ID is typically for the personal use of Apple services, such as storing personal content in iCloud and downloading apps from the App Store. If you have a personal Apple ID, you should create a separate one using your organization's email address to administer Business Chat. A separate administrative Apple ID lets you distinguish Business Chat communications from personal Apple communications. See [Create an Apple ID](#).
2. **Register your organization.** This task is performed by an administrator. Begin Business Chat onboarding by registering your organization's profile. You can register only one organization per Apple ID. See [Register your Organization](#).
3. **Register for either a [Business Chat Account](#) or a [Customer Service Platform](#).** Review the requirements for either account type and start your application process.

Register your Organization

Use the following step to register your organization for a Business Chat profile:

1. Log in to Apple Business Register.
If you do not have an Apple ID yet, go to the Apple Business Register and click Create One.
2. Enter your Apple ID account name and password, then press Return.
3. Review and accept the Terms of Use, then click Agree. An automated email can be sent as a referral copy by clicking "Send by email" located in the upper right corner.
4. Click Get Started.
5. Enter your contact information on the About Yourself screen, then click Next.
6. Select Business for your Organization Type, then click Next.
7. Continue entering information about your organization.
Move between text fields on a screen by pressing Tab. Click the fields to see their instructions. Move to the next screen by clicking Next.

REGISTERING YOUR ORGANIZATION

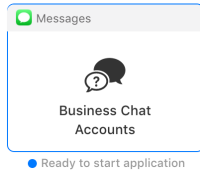
8. Choose one of the following, and an image appears to move the pinpoint location.
 - **Show** your organization's location on Apple Maps.
 - **Do not update Apple Maps.** This does not affect any location data already displayed.
9. Enter URLs for your organization's website and social media.
10. Select the administrator from either the drop-down list or by adding their professional details.
11. When you're finished, click Submit for Review.

What's next

- For **BCA**, apply for your Business Chat Account. See [Submit Your Business Chat Application](#).
- For **CSPs**, apply for your Customer Service Platform. See [Submit Your CSP Application](#).

Submit Your Business Chat Application

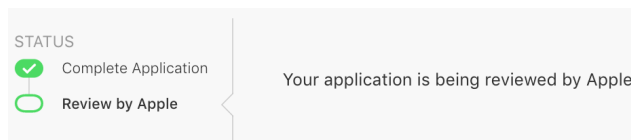
1. Sign in to Apple Business Register. Apple Business Register displays a "Choose services" message.
2. Select "Chat with my customers in the Messages app", click Done.
3. A "Welcome to your homepage" message appears, click OK.
4. Click Business Chat Accounts. You are taken to an application page, click Apply for access.



5. Acknowledge the Business Chat Account policies by reading and selecting each checkbox, then click Next.
By selecting a checkbox you are agreeing to the policy. You cannot proceed unless all checkboxes are selected.
6. Enter the technical contact and sponsoring executive, then click Next.
7. Enter Support Center Operations information, click Next, and continue to enter Business Chat expectations.
8. When you're finished and you've filled out the required information without an error, a Ready to Submit window appears. Click Submit Now, or if you click Later, you can come back and click Submit for Review.

If you make mistakes, alerts help you correct them. When you finish, a completed profile page appears with the button Submit for Review.

After you submit your profile, the status area on the profile page shows that Apple is reviewing your profile.

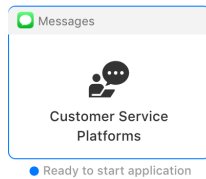


What's next

Apple reviews your application and an email notification is sent to you with the next steps. For more information about onboarding, see [Onboarding Your Business Chat Accounts](#).

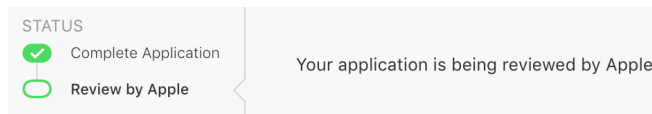
Submit Your CSP Application

1. Sign in to [Apple Business Register](#). When Apple accepts your registration, Apple Business Register displays a “Choose services” message.
2. Select “Connect businesses on my existing messaging platform to Business Chat,” click Done.
3. A “Welcome to your homepage” message appears, click OK.
4. Click Customer Service Platforms. You are taken to an application page, click Apply for access.



5. Acknowledge the Customer Service Platform policies by reading and selecting each checkbox, then click Next.
By selecting a checkbox you are agreeing to the policy. You cannot proceed unless all checkboxes are selected.
6. Enter a Technical Contact from a drop-down list or add by entering their professional details, then click Next.
7. Enter the service information you provide to your business clients, then click Next.
This includes total client customer contacts, total platform business clients, total client live agents, and any supported communication channels.
8. Click Submit Now if you are satisfied with your application. If not, click Later. The application won't be submitted to Apple until you click Submit for review.

At the top of the page is the status area that shows that Apple is reviewing your submission.



What's next

Apple will review your application to ensure that you meet all the qualifications necessary to be a CSP. If you do, Apple will send you an email notification with further instructions to onboard as a CSP provider.