



# **Business Chat Onboarding Your Business Chat Accounts**

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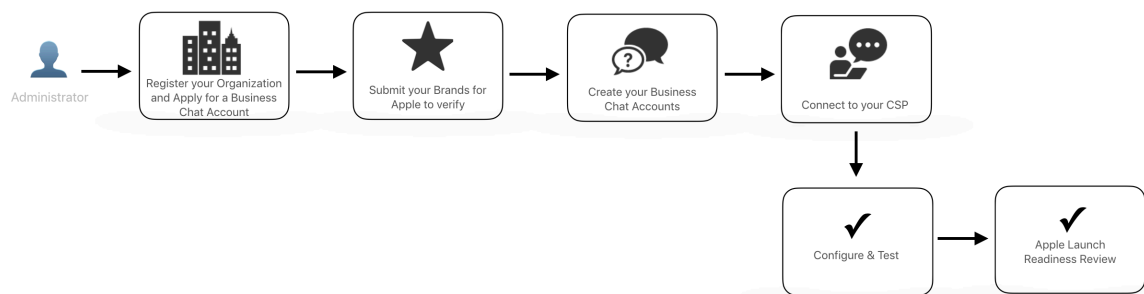
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# Overview

Business Chat Account (BCA) onboarding requires actions from an administrator or a technical contact to setup services and a sponsoring executive to approve the Terms of Use (TOU) internally within the business. For more information on all the roles needed to setup your Business Chat Accounts, see [Assigning Roles to Your Team Members](#).

The following diagram shows the BCA onboarding process. After you register your organization and proceed to creating a Business Chat account, you'll need to fill out your brand information and provide logos for Apple to verify. When configuring your Business Chat account, you can either select an Apple approved CSP provider or, if you already have a CSP, give the URL provided by your CSP. Once this is completed, you can apply for a Business Chat Account for each brand your organization owns. You can create an account for testing, development, staging, or production. Connect with your CSP and work with them to design, configure, and test a positive customer experience. Once your account has been configured, contact your Apple Business Register representative for a launch readiness review.



You should have already registered your organization and submitted and received approval on your Business Chat application. For more information about registering for Business Chat, see [Business Chat Getting Started](#).

Use the following steps to complete your onboarding with Business Chat:

1. **Submit your brand profile to Apple for verification.** Once you've completed your organization application, create your brand profile so Apple can verify their originality. See [Create a Brand Profile](#).
2. **Create a Business Chat Account.** Create and submit a Business Chat account for Apple to review. You can also create a BCA for each brand you own to have access to Business Chat. With each Business Chat account, create an associated brand profile.
3. **Connect to your Customer Service Platform.** Test your BCA to verify you can send and receive messages through your CSP. See [How to Test Your Business Chat Accounts](#).
4. **Configure your website and app Business Chat buttons.** Configure the Business Chat button on your website and app. See [Configure Your Website and App Business Chat Buttons](#).
5. **Tell Apple if you are ready to launch.** Apple will review your account to verify it meets your standards for customer interaction. See [Ready to Launch](#).
6. **User Experience Review.** Contact your Apple Business Register representative to begin a review of your use cases. See [User Experience Review](#).
7. **Enable your website and app Business Chat buttons.** Make your Business Chat publicly available. See [Enable Your Website and App Business Chat Buttons](#).
8. **Tell us how to configure your iOS entry points.** Once your Business Chat buttons are publicly available, reach out to Apple to enable your business and place cards. See [Configure Your iOS Entry Points](#).

9. **Refine and improve your customer's Business Chat experience.** Use the provided resources and tips to further enhance your customer's user experience. See [Refine and Improve Your Customer's Business Chat Experience](#).

## Create a Brand Profile

Use the following steps to add your brand to your Business Chat profile using Apple Business Register:

1. Sign in to Apple Business Register.
2. Click Brands.
3. Click Get Started and enter the requested information in the screens that follow. A series of screens walks you through the creation of a brand profile. To move between text fields on a screen, click the fields or press Tab. To move to the next screen, click Next.
4. Enter your company's primary support phone number on your brand profile.
5. When you're finished, click Later or Submit Now. To review or edit information before submitting it, click Later.

You can add additional brands and logos by clicking the plus button at the top-left corner of the browser window. Your Apple Business Register representative reviews each brand you add.

## Configure the Messages Header

You can configure the header background color for the navigation bar and choose the color of the header icons.

On the Messages Header Configuration page, do the following:

- To set the background color for the navigation bar, click Edit and select a hexadecimal color.
- To set the color for the buttons in the navigation bar, click Edit and select a hexadecimal color.

## What's next

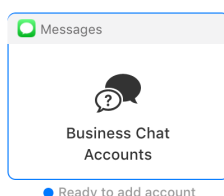
Submit a Business Chat Account application for each brand your own to have access to Business Chat. With each Business Chat account, create an associated brand profile. If you don't have any more brands to submit, you can skip this step.

Once you have finished creating all of your BCAs and brand profiles, connect each of your BCAs to your CSP.

## Create a Business Chat Account

At the end of this task, you should have at least one Business Chat account waiting for Apple to review.

1. Sign in to Apple Business Register.
2. Click Business Chat Accounts, then Get Started.



3. 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.

4. Enter the Registration Type.

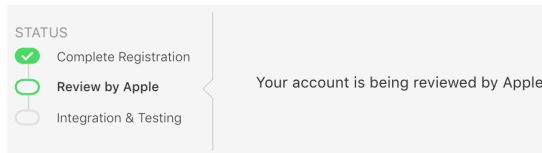
- **Choose "Internal Test Account"** if you intend to use this account for internal testing. See [Test sending and receiving messages](#).
- **Choose "Commercial"** if you intend for this Business Chat Account to be visible to your customers on Apple devices. If you choose Commercial, you are prompted to supply a brand.

If you've created a Commercial BCA, you need to define a wide logo. Go to your Brands profile and submit a wide logo brand. See [Create a Brand Profile](#). For more information about the wide logo requirements, see [Business Chat Guide to Uploading Logos](#).

5. Enter other business information, including your Apple Pay Merchant ID (optional).

A merchant ID identifies you to Apple Pay as being able to accept payments. A Payment Processing certificate that is associated with your merchant ID is used to encrypt payment information. Before your app can use Apple Pay, you need to register a merchant ID and create its Payment Processing certificate. See [Configuring your Environment](#).

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



## What's next

Once your Business Chat Account has been authorized you can begin testing your messaging platform. See [Connecting to Your Customer Service Platform](#) for more information.

## Connecting to Your Customer Service Platform

After integration is complete, you are ready to test with your internal testers. While your Business Chat account is in test mode, only your testers are able to send and receive messages. In addition to sending and receiving messages, you should test the integration with the built-in features ([time picker](#), [list picker](#), and [Apple Pay](#)), as well as any Message apps that you have created.

## Connect to your CSP

Linking your Business Chat account with your CSP account enables your CSP to correctly route your messages.

1. Sign in to Apple Business Register and click on Business Chat Accounts. On the left side, click on the account for your commercial Business Chat Account.
2. Scroll down the Business Chat Account page to the "Customer Service Platform Configuration" section. On the right, click the "Connect to" with the name of your CSP. Click Connect.

**NOTE** If the link "Connect to..." is not available, wait until your Business Chat account has been approved before proceeding with this step.

3. Clicking Connect takes you to your CSPs landing page to complete the account linking process. Your CSP must confirm that your CSP account is linked to your Business Chat account. If you have any questions whether this completed successfully, please contact your CSP directly. Apple cannot assist with this step.
4. Once you received confirmation from your CSP that your Business Chat account is linked to your CSP account, return to your Business Chat account page in [Apple Business Register](#).

## Add testers

Use the following steps to add internal testers to your Business Chat account:

1. Sign in to Apple Business Register.
2. Click Business Chat Accounts and select the account to add testers.
3. Scroll down the page to the "Account Testing."
4. Add your internal testers Apple IDs.
5. Click "Send to new testers" to send an instructional email to your testers when your list is complete and you are ready to begin testing.

An instructional email containing a link to your Business Chat conversation is sent to the Apple ID email address of each tester. If a tester does not receive the email, then recheck that their email address provided in the Account Testing section. Likely the email address is wrong or the email address is not an Apple ID. For security reasons, Apple cannot verify Apple ID email addresses.

## Test sending and receiving messages

Activating the link contained in the testers email allows testers to send messages to your agents who can reply from your CSP agent desktop. When testing, be aware of the following details:

- Design a test to include your support agent desktop and webpage which triggers the appropriate built-in features and Message apps.
- You should observe messages sent from an iOS device are now arriving to your test business. Employees testing from your support agent desktop or webpage should be able to respond to these test messages.
- Your testers may notice that your brand colors are not visible in the Messages header. Brand color is not available while your account is in test mode. Your brands colors will correctly display once your account goes online.
- If you send the testing link to someone who's email is not listed in the Account Testing section, then they will be unable to send messages.
- If you provide a Redirect Page URL and your testers try to enter Business Chat from an unsupported device, then they land either on a default or redirected page. You can set your Redirect Page URL in the "Unsupported Devices" section at the bottom of your Business Chat account page.

Use the following steps to begin testing:

1. From a supported device, ask your testers to find the email sent to them.
2. Click the link in the email from a supported device which takes them to a Business Chat conversation in the Messages app.

## What's next

Configuring the Business Chat button for your website and app, including giving your button a contextual call-to-action.

## Configure Your Website and App Business Chat Buttons

This step configures contextual call-to-action Business Chat buttons on your website and app, but does not enable them. When you are done, your website and app should have the message button configured and enable-ready for your customers to use.

Place a button next to contextual call-to-action message to give your customers an easy way to access your support. Use messages like “Get help quickly. Tap to send us a message.” These call-to-action instructions help your customers understand the type of support they can expect to receive. For more information on contextual call-to-action messages, see Human Interface Guidelines > iOS > Technologies > Business Chat > [Customer Interaction](#).

1. Create a contextual call-to-action Business Chat button for your website. See [Adding a Business Chat Button to Your Website](#).
2. Create a contextual call-to-action Business Chat button for your app, if you have one. See [Starting a Chat from your App](#).
3. Place the contextual call-to-action button on your website or app where you display your support’s primary phone number.
4. Verify that your message buttons are ready on your website or app but have not yet been enabled. You should enable the message buttons *after* your account is publicly accessible so that you can control when you start receiving inbound customer messages.

**NOTE** When integrating the button into your webpage verify the following:

- Remove the double curly braces around your Business ID.
- Don't use a script to add the Start Chat element to the page.
- Use DOM (Document Object Model) to add the Start Chat button directly to the page.
- The button cannot be customized, proportions and colors must remain the same.

## What's next

Send an email to your Apple Business Chat representative and let them know when you are ready to launch.

## Ready to Launch

Send your Apple representative an email giving them a date when you expect to launch. You need to determine if you want to launch with text messaging or if you prefer to have a more enhanced integration with your CSP. Your CSP can help you embed functionality into your agent desktop, like interactive lists for menus and product selections, time pickers for scheduling, authentication for fast customer account sign-in, and Apple Pay for easy payments. Your CSP can also help you integrate your iOS app so that your support agents can trigger functionality existing within your app and to help your customer perform some action, or receive some information.

If you want to provide an enhanced customer experience, contact your CSP directly for more information as Apple cannot help with this refinement.

## What's next

Send your Apple Business Chat representative an email notifying them that you are ready for a user experience review.

Once the review is completed, you can then [Enable Your Website and App Business Chat Buttons](#).

## User Experience Review

The Brand Experience QA Test is conducted by Apple Business Register to test your responsiveness and adherence to conversational guidelines. The test determines the overall look and feel of the conversation transcript, whether logos and names are used correctly. Apple Business Register testers use the rich elements integrated into your design, such as list pickers, time pickers, and rich links. Also, they test the support for any use cases defined upfront.

The Business Chat testers act as regular users, customers, or prospects of your business. They follow predefined use cases, but may also ask questions off the script to test real-world scenarios an agent or bot may encounter in a day-to-day business conversation or transaction. Depending on available resources, the test is conducted in the language, or languages, supported by your business. Usually, the test takes less than one hour to complete.

The following are requirements you need to complete before the Brand Experience QA Test:

- Connect your Apple Business Chat account and confirm that messages are delivered.
- Upload your logos and verify they look as expected.
- Configure, activate, and test bots if applicable.
- Prepare agents for handling Apple Business Chat traffic and train them on the supported use cases.
- In case any use scenario requires providing credentials, such as "check order status", provide such credentials to your Apple Business Register representative in advance of the test.

Within a few days following the test, Apple sends a brief report with a list of any issues observed by the testers.

## What's next

Fix any issues listed in the report received from your Apple Business Register representative. Once all issues have been addressed, enable your Business Chat buttons.

## Enable Your Website and App Business Chat Buttons

Enable the "Chat with Messages" button within your website and app, and launch Business Chat for your customers. Here's what you need to do:

- Verify you have the "Chat with Messages" button on your website and app. If you need to add a "Chat with Messages" button to your website, see [Adding a Business Chat Button to Your Website](#).
- Ready your support agents to receive messages.
- Enable the "Chat with Messages" buttons that are embedded in your website and app. Your business may start receiving customer messages as soon as your Message buttons are publicly visible.



## What's next

Configure your iOS entry points so customers can see the "Chat with Messages" button on your business and place cards.

## Configure Your iOS Entry Points

To show your business and place cards in the iOS entry points, send an email to your Apple Business Chat representative with answers to the following questions:

- Do you want to enable a business card in iOS search results?
- Do you want to enable a message button on your place cards in Apple Maps?

For more information on business and place cards, see [Enabling Business and Place Cards](#).

## What's next

Refining your customer's experience with Business Chat.

## Refine and Improve Your Customer's Business Chat Experience

Your messages buttons are now accessible in iOS search results. Congratulations! You now have Business Chat enabled for your support agents!

Continue to refine and improve your customer experience by considering your top 20 contact reasons, then develop and implement use cases to support your customers. You can also review your customer satisfaction scores and determine what would improve those scores. Develop and implement use cases around those requirements.

# Business Chat Resources

## **Business Chat Policies and Best Practices**

Ensure that your business complies with Apple's Business Chat Policies.

[https://register.apple.com/resources/business-chat/BC-Policies\\_and\\_Best\\_Practices.pdf](https://register.apple.com/resources/business-chat/BC-Policies_and_Best_Practices.pdf)

**Business Chat Sandbox** is best used from a Linux machine. It allows you to better understand the content of the API as it relates to built-in features and iMessage apps: <https://developer.apple.com/support/business-chat-sandbox/>.