Business Chat
Onboarding Your Business Chat Accounts

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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 the “Assigning Roles to Your Team Members” section of Business Chat Getting Started.

The following diagram shows the Business Chat accounts onboarding process. First, apply to use the Business Chat Service that includes registering your organization. When creating your Business Chat account, you can either select an Apple approved CSP provider or, if you already have one, 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. Work with your CSP to design, configure, and test a positive customer experience. Once your account has been fully 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. **Create a Business Chat Account.** Create and submit your Business Chat account for Apple to review. To begin with you should create an internal testing account, and when you’re ready to launch create a commercial Business Chat account. 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. See Create a Business Chat Account or Create a Commercial Business Chat Account.

2. **Connect to your Customer Service Platform.** Test your BCA to verify you can send and receive messages through your CSP. See Connecting to Your Customer Service Platform.

3. **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.

4. **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.

5. **User Experience Review.** Contact your Apple Business Register representative to begin a review of your use cases. See User Experience Review.

7. **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](#).

8. **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 an Internal Testing Business Chat Account

Anyone can setup an internal test account to test use cases in Business Chat prior to launch. Once you’re ready with branding information and launch, create a commercial account. At the end of this task, you should have at least one internal test Business Chat account waiting for Apple to review.

**Connected Services.** Click Business Chat Accounts, then click Get Started.

![Business Chat Accounts](image)

**New account.** 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.

**Business Chat Registration.** Select *Internal Test Account*, then click Next.

Choose *Internal Test Account* if you intend to use this account for internal testing. See [Test sending and receiving messages](#). If you’ve passed Launch Readiness, select *Commercial*.

**Customer Service Platform Configuration.** Select your Customer Service Platform provider or provide your CSPs URL.

**Account Testing.** Select who can message your Business Chat account during testing and how to manage the permissions.

**Apple Pay.** Enter 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](#).

**Account Owner.** Add the account owner and sponsoring executive, if needed.

**End User Authentication.** Add the end user authentication, providing the OAuth information such as the endpoints and client identifier.

**Submit your profile.** After you submit your profile, and you don’t have any alerts, the status area on the profile page shows that Apple is reviewing your profile (left). If you do have alerts (right), you need to fix them before you can submit your profile for review.
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.

Create a Commercial Business Chat Account

Commercial BCAs are used for production. Create a commercial BCA when you’ve completed testing your configuration. At the end of this exercise you should have at least one commercial account ready for Apple to review.

**Connected Services.** Click Business Chat Accounts, then click Get Started.

**New account.** 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.

**Registration Type.** Select *Commercial Account*, then click Next.

**Business for this account.** Select the number of public locations your business has and enter the address for each location. If you choose two or more locations or are an online-only business, you’ll need to set up your brand. For now, you can either select from a drop-down list, if you’ve already set up brands, or add your brand name. Once your commercial account is setup, you’ll need to setup your brands before you can submit your application. For more information about logo requirements, see [Human Interface Guidelines](#).

**Customer Service Platform Configuration.** Select your Customer Service Platform provider or provide your CSPs URL.

For **Manage Access & Entry Points**, select “My testers + Apple employees”. This allows members of our Business Chat Team to test your setup.

For testing your account, select “Restrict access to whitelisted Apple IDs”. This disallows customers from accessing your agents before they’ve been prepped to assist.

For enabling your entry points, select “Links only.” This allows you to have full control over how your customers contact you.

**Apply Pay.** Enter 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 using Apple Pay, you need to register a merchant ID and create its Payment Processing certificate. See [Configuring your Environment](#).

**Account Owner.** Add the account owner and sponsoring executive, if needed.

**End User Authentication.** Add the end user authentication, providing the OAuth information such as the endpoints and client identifier.

**Messages Header Configuration.** Choose the background and button color for the header that appears in the Messages app; and add your square and wide logos.
If you’ve created a Commercial BCA, you need to define a square and wide logo. Go to your Brands profile and submit your logos to Apple for review, see Setting up Your Brand Profile. For more information about logo requirements, see Human Interface Guidelines.

**Response Hours.** Select the timezone, estimated time for a live agent to respond to customers during office hours, and your support’s response hours.

**Unsupported Devices.** Add a redirect URL, if you have one, for unsupported devices. When customers tap the Business Chat button on an unsupported device, they are redirected to this page.

**Submit your profile.** After you submit your profile, and you don’t have any alerts, the status area on the profile page shows that Apple is reviewing your profile. If you do have alerts, you need to fix them before you can submit your profile for review.

**What's next**

If you’ve added brands, you’ll need to set up and configure the messages header for each brand. See Setting up Your Brand Profile.

Otherwise, you can continue to the next step: Connecting to Your Customer Service Platform.

### Setting up Your Brand Profile

Use the following steps to setup your brand for your Business Chat profile using Apple Business Register. For more information about logo requirements, see Human Interface Guidelines.

1. Sign in to Apple Business Register.
2. Click Brands.
3. Click Get Started. 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. 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.

If your brand was created previously, fill out the required sections. Once the sections are complete, the alert message goes away and you’re presented with a Submit for Review.

### Configure the Messages Header

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

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 you 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.

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 “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 is 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 your brand colors are not visible in the Messages header. Brand color is not available while your account is in test mode. Your brand’s colors will correctly display once your account goes online.
- If you send the testing link to someone whose 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
Configure your Business Chat buttons for your website and app, include giving your button a call-to-action message. For more information on design, see Human Interface Guidelines.

Configure Your Website and App Business Chat Buttons
This step configures the call-to-action text for your Business Chat buttons on your website and app, but does not enable them. You can place the buttons on contact information, support, order confirmation, product and order history pages. When you are done, your website and app should have the message buttons configured and enable-ready for your customers to use.

Place a button next to your call-to-action text to give your customers an easy way to access your support. Use messages like “Questions? We can help.” and “Tap to send us a message.” These call-to-action instructions help your customers understand the type of support they can expect to receive.

Place your context message—like “Chat with a financial advisor now.”, “Message us now for quick help.”, or “Tap to chat with our styling experts now.”—in smaller font below the CTA and next to your Business Chat buttons to set your customer’s expectations when they initiate a conversation.
1. Create a call-to-action text with a context message for your Business Chat buttons on your website. See Adding a Business Chat Button to Your Website.

2. Create a call-to-action text with a context message for your Business Chat button on your app, if you have one. See Starting a Chat from your App.

3. Place the call-to-action message with context buttons on your website or app.

4. Verify that your message buttons are ready on your website or app but have not yet been enabled. Later in this process, you will enable your 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 Team and let them know when you are ready to launch.

**Ready to Launch**

Send an email to your Apple Business Chat Team 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 customers 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 Team 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**

When your account is ready, contact your Apple BC Team and let them know that your account is ready for submission to the Brand Experience QA Test. The QA test is conducted by Apple Business Register to test your responsiveness and adherence to conversational guidelines. The QA test determines the overall look and feel of the conversation transcript, and 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.

Before submitting your account to the Brand Experience QA Test, your account needs to meet the following requirements:

- Connect your Apple Business Chat account and confirm that messages are delivered.
- Upload your logos and verify that 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.
- If any use case scenarios require 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 Business Chat buttons within your website and app, and launch Business Chat for your customers. Here's what you need to do:

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

What's next

Configure your iOS entry points so customers can see the Business Chat buttons on your business and place cards.

Configure Your iOS Entry Points

Entry points are turned on once you have a good understanding of your use cases and how your customers are using your Business Chat buttons. Send an email to your Apple Business Chat Team at registry@apple.com 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 for physical locations in Apple Maps?

For more information on business and place cards, see 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 message buttons are now accessible to users. Congratulations!

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.

Business Chat Sandbox allows you to better understand the content of the API as it relates to built-in features and iMessage apps.