



Business Chat Onboarding Your Business Chat Accounts

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Overview

Business Chat Account (BCA) onboarding requires actions from a technical contact to setup services, and configure and test the account with the Messaging Service Platform (MSP) provider. For more information on all the roles needed to setup your Business Chat Accounts, see “Assigning Roles to Your Team Members” in [Business Chat Getting Started](#).

The following diagram shows the Business Chat accounts onboarding process. First, you begin by creating your Business Chat accounts (BCAs) which includes registering your organization to use the Business Chat Service. During the BCA creation process, you can either select an Apple approved MSP provider or, if you already have one, give the URL provided by your MSP. Once this is completed, you can register each brand your organization owns for a Business Chat Account. You can create an account for testing, development, staging, or production. Work with your MSP to design, configure, and test a positive customer experience. Once your account has been fully configured and thoroughly tested with your MSP, contact your Apple Business Register representative for a launch readiness review.



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. You can also create a BCA for each brand you own to use Business Chat. See [Create a Commercial Business Chat Account](#).
2. **Connect to your Messaging Service Platform.** Test your BCA to verify you can send and receive messages through your MSP. See [Messaging Platform Configuration](#) and [Account Testing](#).
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. **User Experience Review.** Contact your Apple Business Register representative to begin a review of your use cases. See [User Experience Review](#).
5. **Tell Apple if you are ready to launch.** Apple will review your account to verify it meets the standards for customer interaction. See [Ready to Launch](#).
6. **Launch Business Chat to your customers.** Make your Business Chat publicly available. See [Enable Your Website and App Business Chat Buttons](#).
7. **Configure your iOS entry points.** Once your Business Chat buttons are publicly available, go to Apple Business Register to enable your business and place cards. See [Configure Your iOS Entry Points](#).
8. **Refine and improve your customer’s Business Chat experience.** Use metrics and use cases to further enhance your customer’s user experience. See [Refine and Improve Your Customer’s Business Chat Experience](#).

Create a Commercial Business Chat Account

Commercial BCAs are used for production. At the end of this exercise you should have at least one commercial account registered and ready for Apple to review.

You can click Progress, located in the upper right corner, at any time to view the status of your account in the Business Chat workflow.

Manage Services. Add Business Accounts for Messages, then click Done.

New account. Click Add new and on the Business Chat Accounts page, click Get Started.

Business Chat Policies. 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.

Overview 1: Business Chat Account.

You're presented with an overview for registering a new Business Chat account. Click Next.

Account Applicant. Fill out or verify your organization's information. Click Next when you're done.

Business Chat Account Type. Select *Commercial Account*, then click Next.

Account Contacts. Enter the technical contact and sponsoring executive for this account, then click Next.

Number of Locations. Select the number of public locations your business has and enter the address for each location.

Overview 2: Brand Information Card.

You are presented with an overview to set up your brand cards.

Brand. You can add a new brand or select from an existing brand. For new brands, you need to fill out the form and click Add.

When you've completed your selection, click Next.

Brand Information Card Details. Fill out or verify the information in the form and click Next.

Messaging Response Hours. Select your timezone and hours of operation, then click Next.

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

Overview 3: Brand Identity.

In this section, you'll provide your logo and choose a background color for the Messages app and listing.

Square Logo. Add a square logo that follows the [Human Interface Guidelines](#) for logos, then click Next.

Review your Square Logo. In this screen, verify your logo's appearance in both dark and light modes. Select the checkboxes and click Next.

Wide Logo. Add a wide logo that follows the [Human Interface Guidelines](#) for logos, then click Next.

Review your Wide Logo. Verify your logo's appearance in both dark and light modes.

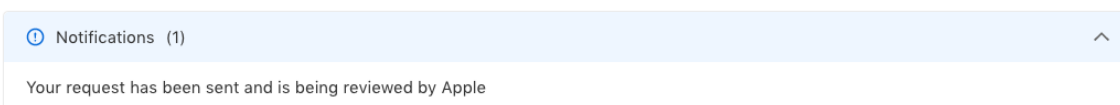
Message Header Colors. Choose the background and button hex-color for the header that appears in the Messages app. You can preview your color choice with your logo for dark and light modes.

Review your Message Header. Verify the color and logo in the preview. Select the checkboxes and click Next.

Overview 4: Messaging Platform Configuration.

Platform. Select your Messaging Service Platform provider or provide your MSPs URL. Click Next to continue.

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

Register a Business Chat Account for each brand you own to use 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, test your connection with each of your BCAs to your MSP.

Messaging Platform Configuration

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.

Verify Your MSP Connection

Although this step is covered when you register your BCA, it's best to verify the link between your Business Chat account and your MSP account as it enables your MSP 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 you want to test.
2. Scroll to the "Messaging Service Platform Configuration" section. On the right, click the "Connect to" with the name of your MSP. 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 MSPs landing page to complete the account linking process. Your MSP must confirm that your MSP account is linked to your Business Chat account. If you have any questions whether this completed successfully, please contact your MSP directly. Apple cannot assist with this step.
4. Once you received confirmation from your MSP that your Business Chat account is linked to your MSP account, return to your Business Chat account page in [Apple Business Register](#).

Account Testing

Select how to test your Business Chat account and add whitelisted testers, if necessary.

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 MSP 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.

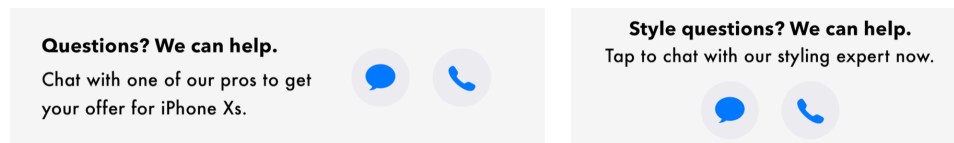
What's next

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 Business Chat's [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’ll enable your message buttons *after* your account is publicly accessible so that you can control when you start receiving inbound customer messages.

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. Your MSP 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 MSP 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 MSP 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 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 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 Apple. 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

Once you have a good understanding of your use cases and how your customers are using your Business Chat buttons, enable your entry points in Apple Business Register by selecting the 'Show Message buttons for *BrandName* on iOS and MacOS' option. To determine which option to setup, answer 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?

If you said yes to either of those questions, then select the 'Show Message buttons for *BrandName* on iOS and MacOS' option. Otherwise, your customers can only contact you using links you've created, such as Business Chat buttons on your websites, in your emails, and so on. For more information on business and place cards, see [Business and Place Cards](#).

If you have any questions, you can send an email with your questions to your Apple Business Chat Team at registry@apple.com.

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 metrics and customer satisfaction scores and determine what would improve those scores. Develop and implement use cases around those requirements.SP

Business Chat Resources

[Business Chat Policies and Best Practices](#)

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

[Business Chat Human Interface Guidelines](#)

Use the guidelines to better understand customer interaction, logo requirements, and visual design

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