GENESYS™

Social Media Solution Guide

Genesys Social Engagement Current

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eServices Social Media Solution Guide

About This Guide

This guide covers areas of information that are required for using the Genesys Social Engagement product. Topics cover the components of Genesys Social Engagement, other associated Genesys products, and some non-Genesys items.

This guide describes the following. Start your reading with the Genesys Social Engagement Overview.

- General information:
    - Genesys Social Engagement Overview
- Deploying Digital Messaging Server
- Using and understanding the Samples for Social Media
- Deploying the Workspace Desktop Edition Plugin

Interoperability and Compatibility

Information on interoperability of Social Engagement components with other eServices and Genesys components can be found in the eServices chapters of the *Migration Guide.* See also the eServices page of the *Supported Operating Environments Guide*

Legal Terms for Social Engagement 9.0.0

Important

If you have not already done so, please read and review the terms and conditions outlined below. It is important that you do not proceed with this upgrade/deployment if you do not accept these terms and conditions.
Read the terms.

Genesys Social Engagement Overview

What It Is

Genesys eServices takes interactions (which may be defined as attempted acts of communication) and gives them a uniform representation that can be processed in the many ways available in the Genesys suite of products.

Genesys Social Engagement is the latest extension of the range of media that eServices can process. The system monitors a social media site, gathers items that fit a defined profile, and converts them into Genesys interactions.

This short video provides an overview of Genesys Social Engagement:

Link to video

Here is a simplified architecture diagram:
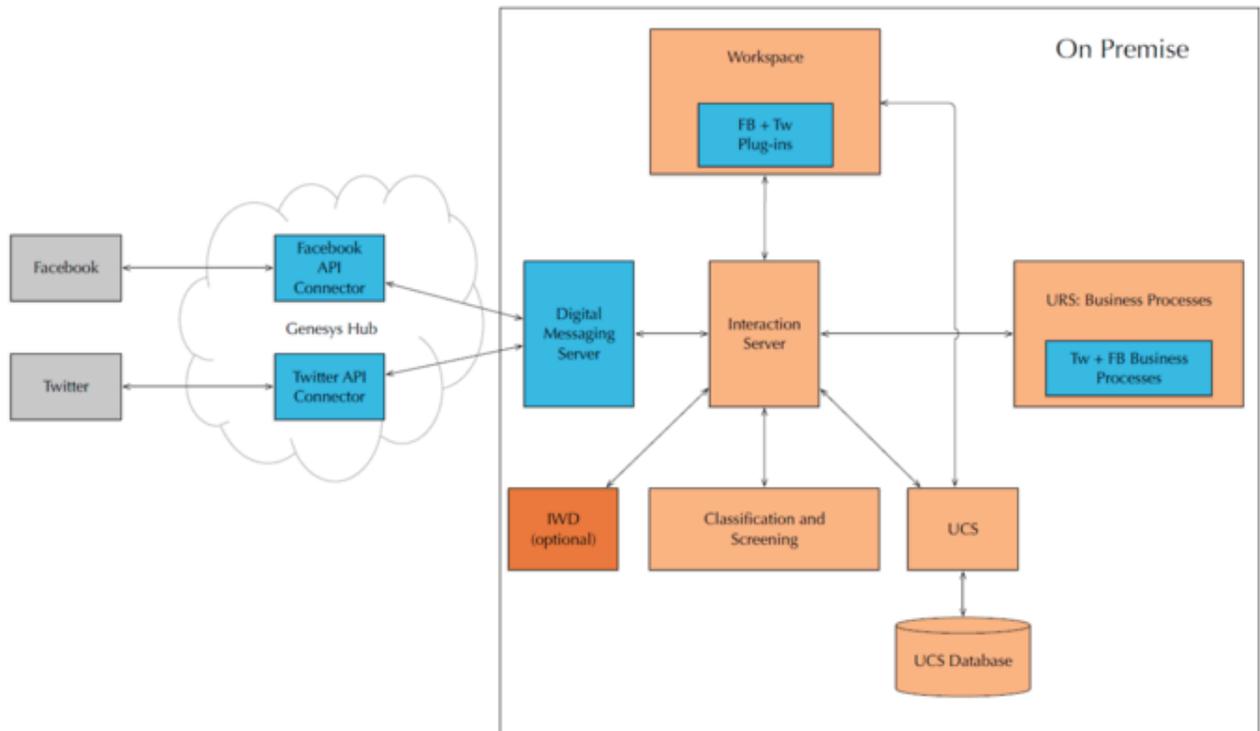
Component dependencies

When using only a Twitter media channel upgrade the following

- Cloud API driver for Twitter
- Workspace Desktop Edition
- Social media Plug-in for Workspace Desktop Edition

Note: will work with both Social Messaging Server/Digital Messaging Server

When using only a Facebook media channel upgrade the following

- Workspace Desktop Edition
- Social media Plug-in for Workspace Desktop Edition

Note: If using Social Messaging Server, then NO Cloud API driver for Facebook upgrade is required. If using Digital Messaging Server, then Cloud API driver for Facebook upgrade is required

When using both Facebook and Twitter media channels upgrade the following

- Cloud API driver for Twitter and Facebook
- Workspace Desktop Edition
- Social media Plug-in for Workspace Desktop Edition

Note: will work with both Social Messaging Server/Digital Messaging Server

Digital Messaging Server

Digital Messaging Server is the eServices component that interfaces with social media sites to bring interactions into the Genesys system.

Refer to the Digital Messaging Server Guide for more information on using this product.

Sample Business Processes for Social Media

The Genesys Social Messaging Management product CD includes two components, each of them containing a number of sample Business Processes:

- Business Process for Use with Facebook
- Business Process for Use with Twitter

Requirements

Interaction Workflows (Business Processes) that handle social media interactions require the following versions of Universal Routing components:

- Interaction Routing Designer (IRD) 8.1.4 or later
- Universal Routing Server 8.1.4 or later

Install the sample Business Processes

Installation is similar for both Business Process installation packages.

> **Tip**
> Business process for use with Twitter 8.5.400.91 involves some special considerations.

General Procedure

1. Double-click `setup.exe`. This installs an application. It also places files in **<eServices_home>\Genesys Business process for use with <SocialMediaName>**.
2. Remove any existing versions of these Business Processes in this tenant: In Interaction Routing Designer, deactivate the component strategies, delete the Business Process, and save changes.
3. From the Start menu, launch the application.
4. The application asks you to log in to the Configuration Layer in order to launch the wizard for this Business Process.
5. Select a Tenant.

6. Decide whether to add Interaction Custom Properties for iWD integration. If you select this checkbox, the wizard adds `desktop_actionable, desktop_influence,` and `desktop_sentiment` to the Interaction Custom Properties under Business Attributes.

7. Select a destination directory for strategy files. This directory will be created (or overwritten if it already exists).

8. Select a resource capacity rule. This concludes the wizard.

9. Use IRD to review the Business Process. There is no need for any import operations.

10. After completing the wizard, you must run an upgrade script to add the corresponding fields to your Interaction Server database. This script is described below.

Configuration Objects Installed

Installing the sample Business Processes creates configuration objects that are listed in Objects Installed with Sample Business Processes.

Database Upgrade Scripts

As part of the installation of the sample Business Processes, the following scripts are installed in **<eServices home>\Genesys Business process for use with <SocialMediaName>\Scripts\<RDMSname>**. The scripts come in pairs, one for cleaning up the existing database and one for performing upgrades. Always run the CleanUp script first.

Important
Follow these steps:

1. Stop the Interaction Server and DB Server (IXN) microservices

2. Apply these scripts to Interaction Server's database (MS SQL Server, Oracle, or DB2)

3. Start the Interaction Server and DB Server (IXN) microservices

- Both Facebook and Twitter:
  - `CleanUpTableInteractionsForIWDIntegration851.sql`
  - `AlterTableInteractionsForIWDIntegration851.sql`

  The Alter script adds fields for sentiment, actionability, and influence to the database. Identical copies of this script are installed in the Twitter and Facebook directories; you only need to run one of them.

- Facebook:
    - `CleanUpTableInteractionsForFacebook851.sql`
    - `AlterTableInteractionsForFacebook851.sql`
      This adds the following fields to the database:
        - `facebookPostId`
        - `facebookInQueueAtTarget`
        - `facebookCommentId`
        - `facebookInBufferBeforeTarget`
- Twitter:
    - `CleanUpTableInteractionsForTwitter854.sql`
    - `AlterTableInteractionsForTwitter854.sql`
      The Alter script adds the following fields to the `Interactions` table:
        - `twitterGroupId`
        - `twitterInBufferBeforeTarget`
        - `twitterInBufferAfterTarget`

Next Steps

Review the sample Business Processes

- Facebook BP
- Facebook BP Simplified
- Facebook BP iWD
- Single Comment Routing
- RSS BP
- Twitter BP
- Twitter BP with iWD
- Twitter BP - Threaded Routing

Sample Business Process: Facebook BP

Facebook BP is a sample Business Process that is supplied on the Genesys Social Messaging Management product CD. Facebook BP submits Facebook interactions to a configured agent group. It consists of eight strategies, four subroutines, and nine queues.

> ### Important
> If the x-submit-comments-itx option is set to `true`, you must use the Sample Business Process: Facebook BP - Single Comment Routing. You can use Facebook BP only if the x-submit-comments-itx option is `false`.

In Release 8.1.0

In broad terms, processing proceeds as follows:

1. The first step depends on whether you want to create a contact record for each author of a comment to a Facebook post. If you do, you must set the `x-submit-comments-itx` option to `true`, which makes the system create an interaction for each comment (this is in addition to the interaction that it creates containing both the base post and all of the comments on it).

   - If the interaction being processed is one of these comment-only interactions, it is sent to the `Stop Interaction Comments in Parking Queue` strategy, which creates a contact for the author of the comment, then terminates.

   - If the interaction consists of a post plus comments, it continues to the next step.

2. This step determines whether this interaction contains comments on some post that is already in the strategy and so should be merged with it.

3. A query is sent to Interaction Server to see if there is already an interaction down the flow in the strategy with the same Facebook Post ID.

4. Then,

   - If such an interaction is found, it is updated with the content of (merged with) the newer interaction, then the newer interaction is terminated.

   - If no such interaction is found in the strategy, then this current interaction proceeds into the buffer stage, which delays the delivery of the interaction to the agent queue.

- The buffer stage is similar to the preceding, but it determines whether this interaction contains comments on some post that has already been delivered to an agent. If it does, the interaction is held until that agent can accept delivery of it.

   a. The buffer stage periodically checks if there is an interaction with the same Post ID being processed by any agent in the group.

   b. Then,

- If there is such an interaction, the current interaction is delayed in the buffer stage until it can be delivered to the agent who is processing the earlier related interaction.

    - If there is no such interaction, it proceeds to the classify and screen stage.

- This stage tries to classify and screen the interactions that will be delivered to the agent group. Note the following:

    - This stage uses:

        - One subroutine that screens for sentiment and actionability.

        - One subroutine that classifies for sentiment.

    - Routing decisions can be made based on the classification/screening results. One way of doing this is presented in this Business Process: All the results are attached to the interaction, and can later be viewed on the agent desktop in the attached data tab.

- Finally the interaction is created in UCS and is delivered to an agent's virtual queue.

> ### Important
>
> For the `MergeItxData` method in the ESP block of Facebook Inbound Strategy to work properly, the `settings/delay-updates` option in Interaction Server should be set to `false`. With this setting, Interaction Server forces updates of interaction properties in the database each time it processes `RequestChangeProperties`.

In Release 8.1.1

1. Facebook Inbound Strategy can be described in two main steps.

    a. The first step depends on whether you want to create a contact record for each author of a comment to a Facebook post. If you do, you must set the `x-submit-comments-itx` option to `true`, which makes the system create an interaction for each comment (this is in addition to the interaction that it creates containing both the base post and all of the comments on it).

        - If the interaction being processed is one of these comment-only interactions, it is sent to the Stop Interaction Comments in Parking Queue strategy, which creates a contact for the author of the comment, then terminates.

        - If the interaction consists of a post plus comments, it continues to the next step.

    b. This step determines whether this interaction contains comments on some post that is already in the strategy and so should be merged with it.

    c. A query is sent to Interaction Server to see if there is already an interaction down the flow in the strategy with the same Facebook Post ID.

    d. Then,

        - If such an interaction is found, it is updated with the content of (merged with) the newer interaction, then the newer interaction is terminated.

        - If no such interaction is found in the strategy, then this current interaction proceeds into the buffer stage, which delays the delivery of the interaction to the agent queue.

- Facebook Inbound Buffer Strategy is similar to the preceding, but it determines whether this interaction contains comments on some post that has already been delivered to an agent. If it does, the interaction is held until that agent can accept delivery of it.

    a. The buffer stage periodically checks if there is an interaction with the same Post ID being processed by any agent in the group.

    b. Then,

        - If there is such an interaction, the current interaction is delayed in the buffer stage until it can be delivered to the agent who is processing the earlier related interaction.

        - If there is no such interaction, it proceeds to the classify and screen stage.

- Classification-Screen Strategy tries to classify and screen the interactions that will be delivered to the agent group. Note the following:

    - The strategy organizes the task as follows:

        - The strategy itself screens and classifies posts for sentiment and actionability.

        - One subroutine screens comments for sentiment and actionability.

        - One subroutine classifies comments for sentiment and actionability.

    - Routing decisions can be made based on the classification/screening results. One way of doing this is presented in this Business Process: All the results are attached to the interaction, and can later be viewed on the agent desktop in the attached data tab.

- Facebook Calculation Strategy processes all previously-attached classification and screening keys and attaches the keys `desktop_sentiment`, `desktop_actionable`, and `desktop_expand`, which the desktop uses in presenting the interaction in its user interface.

- Facebook Agent Delivery Strategy delivers the interaction to the agent desktop.

- Finally,

    - If there is a reply, Facebook Outbound Strategy dispatches it to Digital Messaging Server, for delivery to Facebook.

    - If there is no reply, Facebook Stop Strategy terminates the interaction.

> ## Important
> For the `MergeItxData` method in the ESP block of Facebook Inbound Strategy to work properly, the `settings/delay-updates` option in Interaction Server should be set to `false`. With this setting, Interaction Server forces updates of interaction properties in the database each time it processes `RequestChangeProperties`.

In Release 8.1.4

There are the following changes in this release:

- The Facebook BP now filters out interactions of type `question`. That is, if the substring "<type>question</type>" occurs in the `_facebookXML` value of an interaction, the interaction is terminated.

- The Facebook BP now checks for interactions of type `facebooksession` (Facebook chat) in inbound strategies: FacebookItxType=10. If the type is `facebooksession`, the interaction skips the rest of the inbound strategy and Buffer strategy, and goes straight to the Classify-Screen strategy.

- The new Facebook Outbound Init Queue acts as a virtual queue that provides a temporary placeholder for an outbound interaction for the plug-in while agents work on their content. If the plug-in crashes, the interaction remains in that queue and could potentially be routed to a custom supervisor's desktop, for example. The interaction sits in the strategy for one month (60x60x24x31 sec) and is terminated, but the logic of this strategy can be extended.

In Release 8.5.1

Facebook Agent Delivery Strategy

- Target objects, rather than delivering to a specific group, use the skill-based expression 1=1, meaning the interaction is delivered to any agent who has the capacity to handle social media interactions.

- The first object in the strategy has been updated with `FacebookContentCreatedOnlyByAdmin'=` `UData['_facebookContentCreatedOnlyByAdmin']`

- Right before the target object, the following were added:

  - If object: `if( FacebookContentCreatedOnlyByAdmin != 1 )`

  - Stop Interaction object: `if FacebookContentCreatedOnlyByAdmin =1`

Facebook Outbound Strategy

In order to enable editing of outbound comments and posts, `_facebookPostId` and `_facebookCommentId` are included for all newly created posts and comments.

Facebook Classify-Screen Strategy and Facebook Calculation Strategy

Instead of the `KVListAddData` function, these strategies use `KVListSetData`, which does not create duplicate keys.

Sample Business Process: Facebook BP - Simplified

Facebook BP - Simplified is a sample Business Process that is supplied on the Genesys Social Messaging Management product CD.

Overview

The simplified Facebook business process is designed to process the submitted Facebook interactions in the most simplistic way.

- If the interaction contains both a post and comments:
    1. An interaction is created in the UCS database.
    2. The Facebook post ID and comment ID are updated in the UCS database.
    3. The interaction is delivered to an agent.
- If the interaction contains only a comment, it is parked in a parking queue.

> ## Important
>
> - Starting in release 8.1.4, processing of interactions of type `facebooksession` (Facebook chat) is supported with FacebookItxType=10 .
> - Starting in release 8.5.1, Facebook Agent Delivery Strategy is modified so that target objects, rather than delivering to a specific group, use the skill-based expression 1=1, meaning the interaction is delivered to any agent who has the capacity to handle social media interactions.

Known issue and workaround

The Business Process, Facebook BP – Simplified, has a known issue that prevents users from sending Facebook private messages. The following workaround can be applied to overcome this issue:

1. Add a new local strategy variable umsInbItxSubmittedBy .
2. Assign the UData['_umsInboundIxnSubmittedBy'] interaction parameter to the umsInbItxSubmittedBy variable in the existing **Multi Assign** component.
3. Add new umsInbItxSubmittedBy = '' verification in a new **If** component.

4. Add a new **Function** component with Update['_umsInboundIxnSubmittedBy',
     InboundIxnSubmittedBy] value.

5. In the existing **Function** component, remove the first row with
     Update['_umsInboundIxnSubmittedBy',InboundIxnSubmittedBy] value and leave the second row
     with Update['FromAddress',FacebookActorName] value.

6. For the new **If** component added in Step 3, link the Out port (True condition) to new **Function**
     component with Update['_umsInboundIxnSubmittedBy',InboundIxnSubmittedBy] added in Step 4.

7. For the new **If** component added in Step 3, link the Default port (False condition) to Old **Function**
     component with Update['FromAddress',FacebookActorName] modified in Step 5.

8. Link the new **Function** component with Update['_umsInboundIxnSubmittedBy',
     InboundIxnSubmittedBy] value to old **Function** component with Update['FromAddress',
     FacebookActorName] value.

9. Save and activate the strategy.

You can refer to the following images to know the changes that this workaround applies to the
strategy:
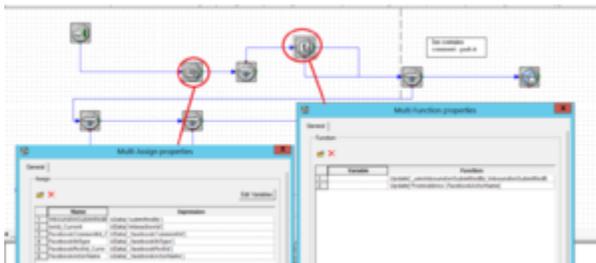
Before applying the workaround
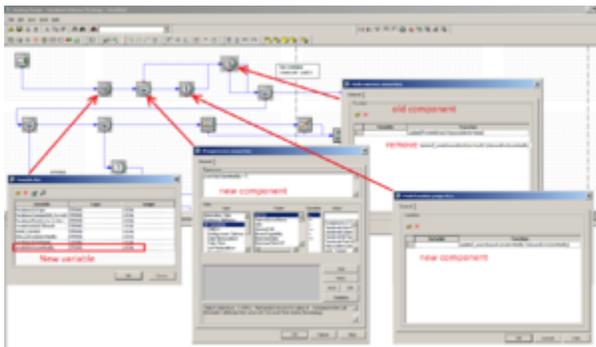
After applying the workaround

Sample Business Process: Facebook BP-iWD

Facebook BP-iWD is a sample Business Process that shows how Genesys Social Messaging can work with Genesys Intelligent Workload Distribution (iWD). Facebook BP-iWD is supplied on the Genesys Social Messaging Management product CD and is used together with two of the Business Processes that are supplied with iWD, as described below.

Requirements

To use Facebook BP-iWD:

- Install Facebook BP. This creates some configuration objects that are required by Facebook BP-iWD.
- Use the iWD Setup Utility to install these Business Processes:
    - Standard Genesys to iWD Adapter
    - IWDBP

For information on how to install and use the iWD Setup Utility, consult the intelligent Workload Distribution Deployment Guide.

> ### Important
> iWD Setup Utility is no longer supported from iWD release 8.5.104 onwards. From that release onwards, all configuration is done manually. See Manual Installation of iWDBP.

In Release 8.1.0

Facebook BP-iWD and its associated Business Processes do the following things.

1. Facebook BP-iWD proceeds in the following stages:
    1. A query is sent to Interaction Server to see if there is already an interaction down the flow in the strategy with the same Facebook Post ID.
        - If such an interaction is found, it is updated with the content (merged) of the newer interaction, then the newer interaction is terminated.
        - If no such interaction is found in the strategy, then this current interaction proceeds into the Buffer stage, which delays the delivery of the interaction to the agent queue.
    2. The Buffer stage periodically checks if an interaction with this Post ID can be delivered to the agent

desktop; in other words, if there is an interaction with the same Post ID being processed by any agent in the group.

- If there is such an interaction, the current interaction is delayed in the buffer stage.

- If there is no such interaction, it proceeds to the Classification and Screening stage.

3. The Classification and Screening stage tries to classify and screen the interactions that will be delivered to the agent group. Note the following:

- This stage uses:

  - A subroutine that screens for sentiment and actionability.

  - A subroutine that classifies for sentiment.

- Routing decisions can be made based on the classification/screening results. One way of doing this is presented in the sample BP, which you can modify. All the results are attached to the interaction, and can later be viewed on the agent desktop in the attached data tab.

4. The last stage passes the interaction to Standard Genesys to iWD Adapter.

2. Standard Genesys to iWD Adapter attaches some required key-value pairs to the interaction, then passes the interaction to IWDBP.

3. IWDBP performs classification, prioritization, distribution, and archiving.

> ## Important
>
> For the `MergeItxData` method in the ESP block of Facebook Inbound Strategy to work properly, the `settings/delay-updates` option in Interaction Server should be set to `false`. With this setting, Interaction Server forces updates of interaction properties in the database each time it processes `RequestChangeProperties`.

For more information about the Standard Genesys to iWD Adapter and IWDBP Business Processes, see the *intelligent Workload Distribution 8.1 Deployment Guide.*

In Release 8.1.1 and Later

1. Facebook Inbound Strategy-iWD can be described in two main steps.

   a. The first step depends on whether you want to create a contact record for each author of a comment to a Facebook post. If you do, you must set the `x-submit-comments-itx` option to `true`, which makes the system create an interaction for each comment (this is in addition to the interaction that it creates containing both the base post and all of the comments on it).

   - If the interaction being processed is one of these comment-only interactions, it is sent to the Stop Interaction Comments in Parking Queue strategy, which creates a contact for the author of the comment, then terminates.

   - If the interaction consists of a post plus comments, it continues to the next step.

   b. This step determines whether this interaction contains comments on some post that is already in the strategy and so should be merged with it.

    c. A query is sent to Interaction Server to see if there is already an interaction down the flow in the strategy with the same Facebook Post ID.

    d. Then,

- If such an interaction is found, it is updated with the content of (merged with) the newer interaction, then the newer interaction is terminated.

- If no such interaction is found in the strategy, then this current interaction proceeds into the buffer stage, which delays the delivery of the interaction to the agent queue.

- Facebook Inbound Buffer Strategy-iWD is similar to the preceding, but it determines whether this interaction contains comments on some post that has already been delivered to an agent. If it does, the interaction is held until that agent can accept delivery of it.

    a. The buffer stage periodically checks if there is an interaction with the same Post ID being processed by any agent in the group.

    b. Then,

- If there is such an interaction, the current interaction is delayed in the buffer stage until it can be delivered to the agent who is processing the earlier related interaction.

- If there is no such interaction, it proceeds to the classify and screen stage.

- Facebook Classification-Screen Strategy-iWD tries to classify and screen the interactions that will be delivered to the agent group. Note the following:

  - The strategy organizes the task as follows:

    - The strategy itself screens and classifies posts for sentiment and actionability.

    - One subroutine screens comments for sentiment and actionability.

    - One subroutine classifies comments for sentiment and actionability.

  - Routing decisions can be made based on the classification/screening results. One way of doing this is presented in this Business Process: All the results are attached to the interaction, and can later be viewed on the agent desktop in the attached data tab.

- Facebook Calculation Strategy-iWD processes all previously-attached classification and screening keys and attaches the keys `desktop_sentiment`, `desktop_actionable`, and `desktop_expand`, which the desktop uses in presenting the interaction in its user interface.

- Facebook iWD Delivery Strategy delivers the interaction to iWD.

> ## Important
>
> For the `MergeItxData` method in the ESP block of Facebook Inbound Strategy-iWD to work properly, the `settings/delay-updates` option in Interaction Server should be set to `false`. With this setting, Interaction Server forces updates of interaction properties in the database each time it processes `RequestChangeProperties`.

In Release 8.1.4

Starting in this release, Facebook BP-iWD:

- Filters out interactions of type question. That is, if the substring "<type>question</type>" occurs in the _facebookXML value of an interaction, the interaction is terminated.

- Checks for interactions of type facebooksession (Facebook chat) in inbound strategies: FacebookItxType=10. If the type is facebooksession, the interaction skips the rest of the Facebook Inbound Strategy-iWD and Facebook Buffer Strategy-iWD, and goes straight to the Facebook Classify-Screen Strategy.

In Release 8.5.1

In Facebook Classify-Screen Strategy and Facebook Calculation Strategy, the KVListSetData function is used instead of KVListAddData. KVListSetData does not create duplicate keys.

Sample Business Process: Facebook BP - Single Comment Routing

Facebook BP - Single Comment Routing is a sample Business Process that is supplied on the Genesys Social Messaging Management product CD. It resembles Facebook BP, except that it submits only interactions that consist of a post and exactly one comment.

Requirements

Set the `x-submit-comments-itx` option to `true`. This makes the system create an interaction for each comment in addition to the interaction that it creates containing both the base post and all of the comments on it.

Description

1. Facebook Inbound Strategy - Single Comment Routing can be described in two main steps.

    a. The first step filters out interactions of type question. That is, if the substring `<type>question</type>` occurs in the _facebookXML value of an interaction, the interaction is terminated.

    b. The next step filters out any interactions consisting of a post and multiple comments. If the interaction is a post and multiple comments, it is sent to the Facebook Stop Strategy - Single Comment Routing, which terminates it. If the interaction consists of a post plus a single comment, it continues to the next step.

2. Classification-Screen Strategy - Single Comment Routing tries to classify and screen the interactions that will be delivered to the agent group. Note the following:

    - The strategy organizes the task as follows:

        - One subroutine screens for sentiment and actionability.

        - One subroutine classifies for sentiment.

    - Routing decisions can be made based on the classification/screening results. One way of doing this is presented in this Business Process: All the results are attached to the interaction, and can later be viewed on the agent desktop in the attached data tab.

3. Facebook Calculation Strategy - Single Comment Routing processes all previously-attached classification and screening keys and attaches the keys `desktop_sentiment`, `desktop_actionable`, and `desktop_expand`, which the desktop uses in presenting the interaction in its user interface.

4. Facebook Agent Delivery Strategy - Single Comment Routing delivers the interaction to the agent desktop.

5. Finally,

- If there is a reply, Facebook Outbound Strategy - Single Comment Routing dispatches it to Digital Messaging Server, for delivery to Facebook.

- If there is no reply, Facebook Stop Strategy - Single Comment Routing terminates the interaction.

8.1.4

Starting in this release, processing of interactions of type `facebooksession` (Facebook chat) is supported with `FacebookItxType=10`

8.5.1

In this release there are the following changes.

Facebook Agent Delivery Strategy

- Target objects, rather than delivering to a specific group, use the skill-based expression `1=1`, meaning the interaction is delivered to any agent who has the capacity to handle social media interactions.

- The first object in the strategy has been updated with `FacebookContentCreatedOnlyByAdmin'= UData['_facebookContentCreatedOnlyByAdmin']`

- Right before the target object, the following were added:

  - If object: `if( FacebookContentCreatedOnlyByAdmin != 1 )`

  - Stop Interaction object: `if FacebookContentCreatedOnlyByAdmin =1`

Facebook Outbound Strategy

In order to enable editing of outbound comments and posts, `_facebookPostId` and `_facebookCommentId` are included for all newly created posts and comments.

Facebook Classify-Screen Strategy and Facebook Calculation Strategy

Instead of the `KVListAddData` function, these strategies use `KVListSetData`, which does not create duplicate keys.

Sample Business Process: Twitter BP

Twitter BP is a sample Business Process that is supplied on the Genesys Social Messaging Management product CD.

There is also a sample Twitter BP with iWD.

Enable compliance with Twitter

> ### Important
>
> Although you can enable or disable the compliance feature, you must always configure it to meet the Twitter Compliance. Genesys recommends that you enable this feature, otherwise you may be in violation of Twitter's policy.

Starting with 9.0.012.09, Cloud API Driver for Twitter can be configured to meet the Twitter compliance requirement of processing the Tweet delete updates as they arrive from the Twitter API.

Prerequisites

Ensure the compliance-enabled option is available in Twitter interaction attributes. If the option is not available, create it using the following steps:

1. Create a new interaction attribute in **Configuration Server\<your tenant>\Business Attributes\ Interaction Attributes** .
2. Enter the following values:
   - Name as **ComplianceId**
   - Display name as **ComplianceId**
   - Description as **Twitter ComplianceId**
3. In Annex, define, `settings\is-sortable = true`

Steps

1. Open the Twitter Outbound Strategy
2. Open **Variables list** and add a new variable **TwitterComplianceId** with type STRING.
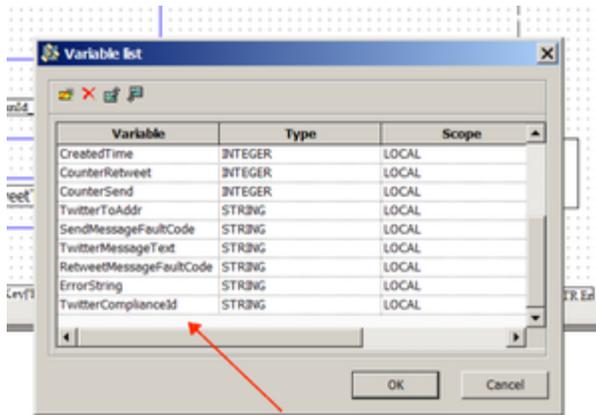
Variables list

3. Find the **SendMessage** call from **ExternalServiceRequest** block and open it.
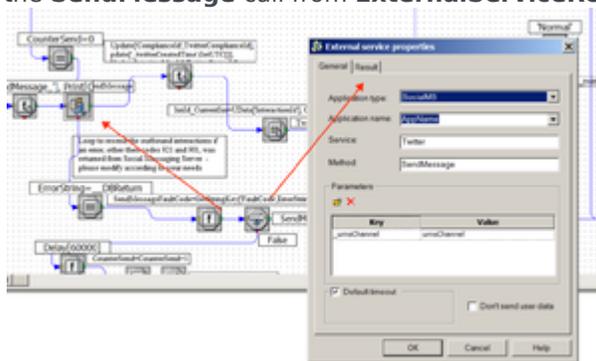
SendMessage

4. Navigate to the **Result** tab and add a new assignment, **TwitterComplianceId** variable to the **ComplianceId** field of ESP request execution result, and click **OK**.
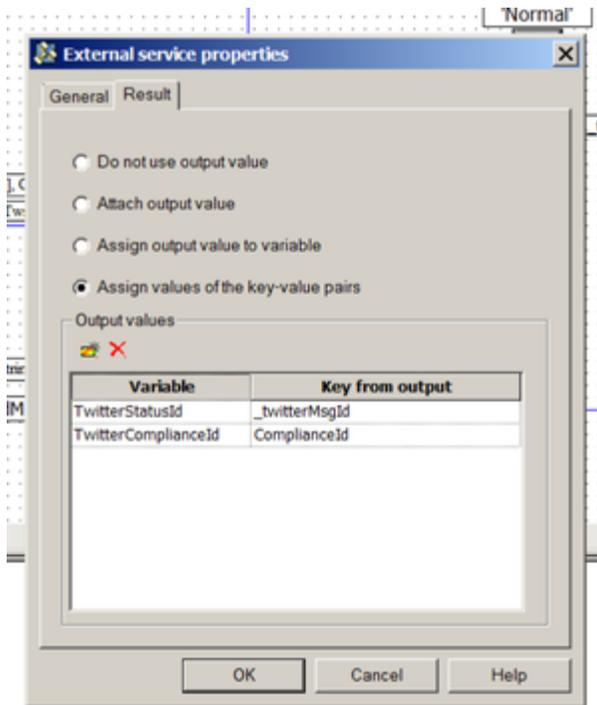
ComplianceId

5. Open the **Function** block and add an update function of **ComplianceId** User Data field to the **TwitterComplianceId** variable.
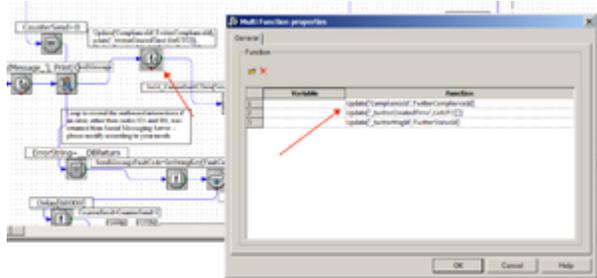
Update Function

6. Click **OK**.

In Release 8.1.0

Twitter BP performs the following simple processing, using two strategies:

1. Twitter Inbound Strategy

   1. Filters out tweets that already exist as interactions in the Universal Contact Server (UCS) database

   2. Creates an interaction in the UCS database

   3. Sends a request to Classification Server to screen and classify the interaction

  4. Delivers the interaction to an agent, along with the results of the screening and classification

2. Twitter Outbound Strategy dispatches a reply from the agent to Digital Messaging Server, for delivery to Twitter.

In Release 8.1.1 and Later

Twitter BP uses the following strategies:

1. Twitter Inbound Strategy

  1. Initializes the required variables.

  2. Ensures that the interactions will be delivered to agents in the order they were created.

  3. Checks whether the interaction already exists in the UCS database and, if not, creates it.

  4. Associates the interaction with the correct thread.

  5. Creates contacts in UCS.

2. Twitter Classify-Screen Strategy performs classification and screening, and attaches the resulting Actionability and Sentiment attributes to the interaction.

3. Twitter Influence Calculation Strategy calls up the Klout service and attaches the appropriate keys showing the influence values.

4. Twitter Calculation Strategy processes all previously-attached classification and screening keys and attaches the keys `desktop_sentiment`, `desktop_actionable`, and `desktop_expand`, which the desktop uses in presenting the interaction in its user interface.

5. Twitter Agent Delivery Strategy delivers the interaction to the agent desktop.

6. Twitter Outbound Strategy dispatches a reply from the agent to Digital Messaging Server, for delivery to Twitter.

In Release 8.1.2

- The Twitter BP now processes errors returning from Twitter when send message, submit post, or submit comment requests are sent to the Twitter driver. If an error is returned, the Twitter BP will make multiple consecutive attempts to send these requests to the driver until either the messages have been successfully posted or the limit for the number of attempts has been reached.

- UCS implements threading based on the Twitter `inReplyToStatusId` attribute (called `_twitterInReplyToStatusId` in interaction data). This attribute is not presented in direct messages; because of that every direct message starts a new thread in UCS. The outbound strategy now makes sure that the correct threading info is saved in UCS.

- When the `SendMessage` ESP request is sent, the `StatusId` of the posted message is returned by the Twitter API. This `StatusId` is then saved in UCS for the current outbound interaction. This information will be used later by the inbound reply interaction to thread them together. The inbound Twitter strategy takes care of the message threading in UCS by checking the contact and looking for an interaction whose `StatusId` is equal to `inReplyToStatusId` (if it exists) of the current inbound interaction. If a matching interaction is found, the inbound interaction is threaded as a child of the matching interaction.

In Release 8.1.201

- The new Twitter Outbound Init Queue acts as a virtual queue that provides a temporary placeholder for an outbound interaction for the plug-in while agents work on their content. If the plug-in crashes, the interaction remains in that queue and could potentially be routed to a custom supervisor's desktop, for example. The interaction sits in the strategy for one month (60x60x24x31 sec) and is terminated, but the logic of this strategy can be extended.

In Release 8.5.1

- Twitter Outbound Strategy—A Function is added that updates user data with a key-value pair. The key is the message ID of the outbound interaction, and the value represents the Twitter status ID of the interaction. This makes it possible for the agent to delete outbound Tweets.

- Twitter Agent Delivery Strategy—Target objects, rather than delivering to a specific group, use the skill-based expression 1=1, meaning the interaction is delivered to any agent who has the capacity to handle social media interactions.

Sample Business Process: Twitter BP with iWD

Twitter BP with iWD is a sample Business Process that shows how Genesys Social Messaging can work with Genesys Intelligent Workload Distribution (iWD). Twitter BP with iWD is supplied on the Genesys Social Messaging Management product CD and is used together with two of the Business Processes that are supplied with iWD, as described below.

Requirements

To use Twitter BP with iWD:

- Install Twitter BP. This creates some configuration objects that are required by Twitter BP with iWD.
- Use the iWD Setup Utility to install these Business Processes:
    - Standard Genesys to iWD Adapter
    - IWDBP

For information on how to install and use the iWD Setup Utility, consult the intelligent Workload Distribution Deployment Guide.

> ### Important
> iWD Setup Utility is no longer supported from iWD release 8.5.104 onwards. From that release onwards, all configuration is done manually. See Manual Installation of iWDBP.

In Release 8.1.0

Twitter BP with iWD and its associated Business Processes do the following things:

1. Twitter BP with iWD performs initial processing, using the Twitter Inbound Strategy-iWD strategy to:
    1. Filter out tweets that already exist as interactions in the Universal Contact Server (UCS) database.
    2. Create an interaction in the UCS database.
    3. Pass the interaction to Standard Genesys to iWD Adapter.

2. Standard Genesys to iWD Adapter attaches some required key-value pairs to the interaction, then passes the interaction to IWDBP.

3. IWDBP performs classification, prioritization, distribution, and archiving.

For more information about the Standard Genesys to iWD Adapter and IWDBP Business Processes, see the *intelligent Workload Distribution 8.0 Deployment Guide*.

In Release 8.1.1 and Later

1. Twitter Inbound Strategy-iWD

    1. Initializes the required variables.

    2. Ensures that the interactions will be delivered to agents in the order they were created.

    3. Checks whether the interaction already exists in the UCS database and, if not, creates it.

    4. Associates the interaction with the correct thread.

    5. Creates contacts in UCS.

2. Twitter Classify-Screen Strategy-iWD performs classification and screening, and attaches the resulting Actionability and Sentiment attributes to the interaction.

3. Twitter Influence Calculation Strategy-iWD calls up the Klout service and attaches the appropriate keys showing the influence values.

4. Twitter Calculation Strategy-iWD processes all previously-attached classification and screening keys and attaches the keys desktop_sentiment, desktop_actionable, and desktop_expand, which the desktop uses in presenting the interaction in its user interface.

5. Standard Genesys to iWD Adapter attaches some required key-value pairs to the interaction, then passes the interaction to IWDBP.

6. IWDBP performs classification, prioritization, distribution, and archiving.

For more information about the Standard Genesys to iWD Adapter and IWDBP Business Processes, see the *intelligent Workload Distribution 8.0 Deployment Guide*.

Sample Business Process: Twitter BP - Threaded Routing

This Business Process was introduced with Business process for use with Twitter 8.5.400.91. There are some special considerations that are specific deploying to this Business Process, described in Deploying below.

Twitter BP - Threaded Routing is a sample Business Process that submits grouped Twitter interactions to a configured agent group. It consists of ten strategies, four subroutines, and ten queues.

In broad terms, processing proceeds as follows:

1. **Twitter Inbound Strategy-TR**:

   1. A query is sent to Interaction Server to see if there is already an interaction with the same Twitter Group ID farther along in the strategy.

   2. Then,

      - If such an interaction is found, it is updated with the content of (merged with) the newer interaction, and the newer interaction is terminated.

      - If no such interaction is found in the strategy, then the current interaction proceeds to the buffer stage.

2. In the buffer stage, **Twitter Inbound Buffer Strategy-TR** holds the interaction for the period specified in the grouping-timeout option for the relevant Twitter channel. During this time, any other incoming interactions from this sender are added. When the specified period is up, the interaction is sent to Twitter Post Buffer Strategy-TR.

3. **Twitter Post Buffer Strategy-TR** is similar to Twitter Inbound Strategy in Twitter BP. It:

   1. Initializes the required variables.

   2. Ensures that the interactions are delivered to agents in the order they were created.

   3. Checks whether the interaction already exists in the UCS database and, if not, creates it.

   4. Associates the interaction with the correct thread.

   5. Creates contacts in UCS.

4. **TwitterCalculationOfDesktopFlagsOtherPosts-TR** calls in a cycle **TwitterCalculationOfDesktopFlags-TR** (which is similar to Twitter BP) for every item from the existing group of tweets.

5. The remaining seven strategies are the same as the strategies with the same names (minus the appended -TR) used in Twitter BP.

If the *No results* option in Digital Messaging Server is missing or is set to an invalid value, Twitter BP - Threaded Routing works the same as Twitter BP.

Deploying

Twitter BP - Threaded Routing was introduced in the Business process for use with Twitter 8.5.400.91 Installation Package (IP). Prior to the release of that IP, it was possible to obtain Twitter BP - Threaded Routing as an Interaction Routing Designer (IRD) export package. If you previously installed Twitter BP - Threaded Routing by importing it into IRD, your procedure for deploying the Business process for use with Twitter 8.5.400.91 IP differs in a few places, indicated in the description below.

1. First,

    - If you previously installed Twitter BP - Threaded Routing, run the Business process for use with Twitter IP using the general deployment procedure.

    - Otherwise, install all of the following:

        - Business process for use with Twitter

        - Social Media Plug-in for Workspace version 8.5.400.86 or higher

        - Cloud API Driver for Twitter 8.5.400.53 or higher

        - Cloud API Driver for Facebook 8.5.400.67 or higher (required only if you have both Facebook and Twitter channels in the same Digital Messaging Server).

2. Deactivate the old Business Process strategies: In IRD, right-click Twitter BP and select **Deactivate Strategies**.

3. In the Digital Messaging Server configuration options, in the section for the relevant Twitter channel (**channel-Twitter-*any-name***), add the option,*No results* and give it a value in the range 10–3600. This is the timespan, in seconds, within which tweets must arrive in order to be grouped together.

4. Check queues: Stop Digital Messaging Server, then use Genesys Administrator or Configuration Manager to check or set the following options:

    - Digital Messaging Server: **[endpoints:*related_tenantId*]** > **twitter_queue** must have the value `Twitter TR Inbound Queue`.

    - Workspace Desktop Edition: **[interaction-workspace]** > **twitter.default-queue** must have the value `Twitter TR Outbound Init Queue`.

    - Workspace Desktop Edition: **[interaction-workspace]** > **twitter.outbound-queue** must have the value `Twitter TR Outbound Queue`.

5. Now,

    - If you previously installed Twitter BP - Threaded Routing, install:

        - Social Media Plug-in for Workspace version 8.5.400.86 or higher

        - Cloud API Driver for Twitter 8.5.400.53 or higher

        - Cloud API Driver for Facebook 8.5.400.67 or higher (required only if you have both Facebook and Twitter channels in the same Digital Messaging Server).

    - Otherwise, proceed to the next step.

6. Restart:

    - Digital Messaging Server.

    - Universal Routing Server

- Universal Contact Server

- Interaction Server

- Workspace Desktop Edition

Important

For the `MergeItxData` method in the ESP block of Twitter Inbound Strategy to work properly, the `settings/delay-updates` option in Interaction Server should be set to `false`. With this setting, Interaction Server forces updates of interaction properties in the database each time it processes `RequestChangeProperties`.

Objects Installed with Sample Business Processes

Overview

Installing the sample Business Processes creates various objects in your environment, most of them being objects in the Configuration Layer.

> ### Important
> This page lists configuration objects by their Display Name. Where the Name differs from the Display Name, it is given in parentheses.

Common to Facebook and Twitter

These objects are used by both the Facebook and Twitter Business Processes and are installed with each of them.

- Business Attributes: Contact Attribute
    - _umsMediaAccount
- Capacity Rule
    - Default_Social_Media_Capacity_rule
- Language
    - English for Sentiment Analysis (English_Sentiment)

Facebook

Business Process for Use with Facebook also installs the following objects:

- Business Attributes: Contact Attributes
    - Facebook Actor ID (_facebookActorId)

- Facebook Actor Name (_facebookActorName)
- Business Attributes: Interaction Attributes
  - _facebookPostId
- Business Attributes: Interaction Custom Properties
  - _facebookCommentId
  - _facebookInBufferBeforeTarget
  - _facebookInQueueAtTarget
  - _facebookPostId
- Business Attributes: Media Type
  - facebook
  - facebookprivatemessage
  - facebooksession

Facebook with iWD Integration

- Business Attributes: Interaction Custom Properties
  - desktop_actionable
  - desktop_influence
  - desktop_sentiment

RSS

- Business Attributes: Contact Attribute
  - _rssItemAuthor
- Business Attributes: Media Type
  - rss
- Capacity Rule
  - Default_Social_Media_Capacity_rule
- Language
  - English for Sentiment Analysis (English_Sentiment)

Twitter

Business Process for Use with Twitter also installs the following objects:

- Business Attributes: Contact Attribute
    - Twitter User ID (_twitterFromUserId)
    - Twitter From Address (_twitterFrom Addr)
- Business Attributes: InteractionCustomProperties
    - _twitterGroupId
    - _twitterInBufferBeforeTarget
    - _twitterInAfterBeforeTarget
- Business Attributes: Interaction Attribute
    - TwitterMsgId
    - _twitterGroupId
- Business Attributes: Media Type
    - twitter
    - twitterdirect

> ### Important
> mediatype `twitterdirect` attribute should be added manually in **Business Attributes > Media Type** with the same values as the mediatype `twitter` attribute.

Knowledge Management Export Files

Installing any of the sample Business Processes also places the following files in `\eServices DRAFT\ Genesys Business process for use with <socialmedia>\KnowledgeManagerExport`:

- SentimentAndActionabilityScreeningRules.kme
- EnglishSentiment.kme
- Actionability.kme

These files can be used in eServices Manager Plug-in for GAX and Content Analyzer to detect sentiment and actionability.

- SentimentAndActionabilityScreeningRules.kme uses screening rules.
- EnglishSentiment.kme and Actionability.kme use natural language processing.

Sample Business Process for Apple Messages for Business

Apple Messages for Business uses the same business process as Chat.

Refer to the Chat Business Process Sample for more information.

Hub Connectors

> **Important**
>
> Starting with Social Engagement 8.5.2, on-premise drivers point to connectors in the Genesys Hub that interface with the Facebook and Twitter APIs.

Why Use the Hub Connectors?

Prior to the release of Genesys Social Engagement 8.5.2, the APIs for Twitter and Facebook were installed on-premise at the customer's site. The key problem experienced by customers around this architecture related to the volatility of the Twitter and Facebook APIs. It is often the case that Twitter and Facebook make changes to their APIs with minimal notice. The repercussions of these changes are often unknown until after they have been rolled out. By moving the Social Media API connectors to the Genesys Hub, Genesys can track and apply changes to the APIs centrally and without the need to release hot-fixes; thus protecting you from the volatility and reducing the risk of unexpected service outages. When the drivers are managed in the cloud, Genesys has the opportunity to provide you with the latest versions of the APIs on a more consistent basis.

How Does it Work?

Inbound messages are pulled or streamed from Twitter, Facebook, and Apple Messages for Business and simply passed to Genesys Hub, and from there on to the Digital Messaging Server where they are lined up for processing.

When a message (we call them all posts) is processed, it is placed in the database in a standard way that supports display of history, discovery of trends, review of reports in key metrics. The post is inserted into an existing conversation, or new conversation, if needed. It is then placed in a Queue for pickup by Driver clients, if not present already.

Outbound messages are also dispatched to Twitter, Facebook, and Apple Messages for Business via Genesys Hub.

Genesys Social Engagement and Apple Business Chat
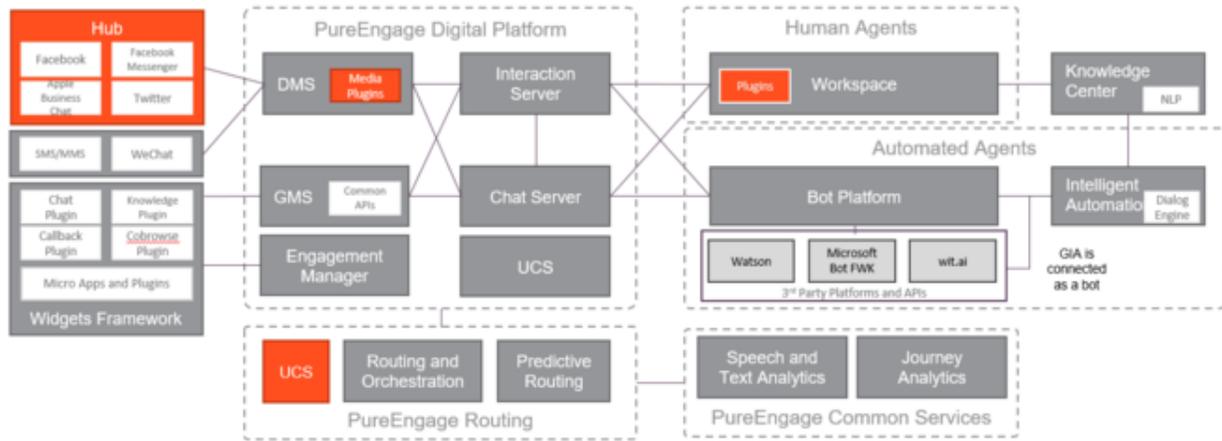
Setting Up Social Engagement

Overview

Social Engagement 8.5.2 introduced new data architecture. From 8.5.2 onwards, the API connectors to Twitter and Facebook are stored in the Genesys Hub. This allows the Genesys Engineering team to quickly adapt to changes to the APIs made by Twitter and Facebook, and thus protect customers from the volatility inherent in connecting to Social Networks via APIs. Now, besides installing Twitter and Facebook drivers on-premise, you must also set up and configure the cloud component, Genesys Hub.

Important

- Contact Twitter or Facebook to get your business ID before proceeding with account and channel creation in Genesys Hub.

- In release 9.0, Genesys Engage cloud for Social has been renamed to Genesys Hub. For information about the current active version of the Genesys Hub environment, see the Genesys Hub Release Note.

Legal Terms for Social Engagement 9.0.x

Important

If you have not already done so, please read and accept these terms to continue.

Installing On-premise Components

Important

Regardless of whether you are a new customer or an existing customer upgrading, it's critical that you have already read and accepted the legal terms referenced above.

For New Social Engagement Customers:

1. Install Digital Messaging Server.
2. Install Social Engagement 8.5.x or 9.0.x

For Existing Social Engagement Customers:

1. Uninstall your existing drivers and remove their configuration options, as described here.
2. Proceed to install Social Engagement 8.5.x or 9.0.x, as described in the following section.

Installing Social Engagement 8.5.x or 9.0.x

1. Download the installation packages for Genesys Cloud API Driver for Twitter and Genesys Cloud API Driver for Facebook.
2. Locate the installation script for each driver (**install.exe** for windows and **install.sh** for Linux platforms) and run it.
3. While running the script you will be asked to enter/confirm:

   - Host Name
   - Configuration Server Host Name
   - Network port
   - Username
   - Password

4. Select a Digital Messaging Server object.
5. Answer any other questions and finish the installation.
6. If you are an existing customer,

   a. In Genesys Administrator Extension, select the Digital Messaging Server object, go to the **Options** tab, and select **Import**.

   b. Import the configuration files **driver-for-facebook-options.cfg** for Facebook and **driver-for-twitter-options.cfg** for Twitter (usually located in **...SMServer/media-channel-drivers/channel-facebook** and **.../SMServer/media-channel-drivers/channel-twitter)**. Select to *NOT* override the existing configuration options. At this point, you have two new configuration sections: **[channel-facebook]** and **[channel-twitter]**. For more information on importing .cfg files, see the Genesys Administrator Extension User Guide.

7. Use Genesys Administrator Extension to configure your Digital Messaging Server application for the Twitter and Facebook driver channels. For more information about the Digital Messaging Server options, see the Digital Messaging Server Guide.

Preparing for the Cloud Integration

After you have completed the above steps, you can gather the following information:

1. Identify and note the name of the company/organization that will be using the product—for example, XYZ Corp. This is your Account name for Genesys Hub.

2. **For Twitter:**

   a. Identify and note the handle, (and optionally, keyword strings) that you plan to use for your Twitter feed:

      • In most instances, using just the Twitter handle used for responding will be a sufficient first step; for example, '@XYZCorp_Help'.

      • It is **CRITICAL** that only the appropriate keywords are used. Twitter does not permit infinite access to the Twitter data feed. If very broad or popular keywords are used inappropriately, too much data will be consumed. If keywords such as: #JustinBieber, #iphone, #awesome were used the likely result would be a data failure.

      • Testing for keywords may be necessary in order to check and see if they are inappropriate. To do this go to https://twitter.com/search-home and enter the keyword(s) you plan to use (one at a time). View the search results and if they are relevant. Only relevant keywords should be used.

   b. Note the login and password credentials for any twitter handles you intend to use with Social Engagement.

3. **For Facebook:**

   a. Identify and note the names of the of the Facebook pages that you plan to use.

   b. Note the login and password credentials for the user that has administrator access to these Facebook pages.

Note also the following:

• **Ports**—Both Twitter and Facebook drivers (installed in Digital Messaging Server) connect to the Social Admin platform (in the Genesys Hub) using HTTPS on standard port 443. All API calls must go over HTTPS.

• **Copy, Paste, Save**—In the first seven steps of the following setup you will have to copy and save various pieces of text in order to use them in later steps. Please have a plain-text editor ready on your desktop and be prepared to save text (along with descriptions regarding the text) from steps 1 through 7.

Allowing host URLs for attachment support

When a brand's user sends an attachment through any Social Media platform or Messaging Apps, Genesys Hub temporarily stores these attachments in the Amazon S3 - Web Services. To download these attachments, customers are required to add some AWS URLS to their allowlist for security reasons.

Customers who need the AWS URLs for attachment support must allow the below URLs in their firewall:

```
*.s3.eu-west-1.amazonaws.com
*.s3-eu-west-1.amazonaws.com
*.s3.dualstack.eu-west-1.amazonaws.com
*.s3-control.eu-west-1.amazonaws.com
*.s3-control.dualstack.eu-west-1.amazonaws.com
```

In addition to the AWS URLs, customers must allow the following Twitter and Facebook URLs in their firewall to ensure that inbound attachments work properly.

Twitter

```
twitter.com
*.twitter.com
twimg.com
*.twimg.com
twttr.net
*.twttr.net
twttr.com
*.twttr.com
abs.twimg.com
*.abs.twimg.com
```

Facebook

```
*.facebook.com
*.facebook.net
*.fbcdn.net
*.fbsbx.com
*.akamaihd.net
```

Cloud Integration

Contents of this section:

1. Set up an account

2. Create a Twitter account channel

3. Create a Twitter service channel

4. Create a Facebook account channel

5. Create a Facebook service channel

6. Define an Admin user

7. Configure connections

8. Using more than one Twitter handle

1. Set up your company/organization account

The first step of deploying Social Engagement requires you to create an Account within Genesys Hub.

a. Navigate to https://socialanalytics.genesyscloud.com/gse/signup. You should see a form titled "Setup your Social Engagement Software."

> ### Important
> We recommend that you always use https://socialanalytics.genesyscloud.com to access Hub. But if you prefer

a static URL, you can alternatively use https://static.socialanalytics.genesyscloud.com .

Setup Form

b. Populate the fields. Note and copy the value of **Company/Org. Name** to your text file (for example, **Company/Org. Name:** `##> ACME XYZ123 Corp.`) You'll use this text in a later step of this setup.

> ## Important
>
> Email addresses such as Gmail and Yahoo Mail are considered as personal accounts. Therefore, you must use an email ID that reflects your organization's domain when signing up for Hub. Existing users can update the email ID by accessing the **My Profile** page in Hub. If your Hub account is locked due to an invalid email address, contact Genesys Customer Care for activating your account again.

c. Click **Continue**.

d. Go to your email inbox and open the email titled "Confirmation required for Genesys Social Engagement deployment". If you don't see it, check your spam folder.

e. Follow the steps described in the email and select the option to log in using the email and password you've just created.

f. After successfully logging in, click **My Account** in the left navigation pane. The account update page is displayed.

g. Copy the value of the **API key** field to your clipboard using the **Copy API key to clipboard** option (displayed next to the field). You'll need it in a later stage of this setup.
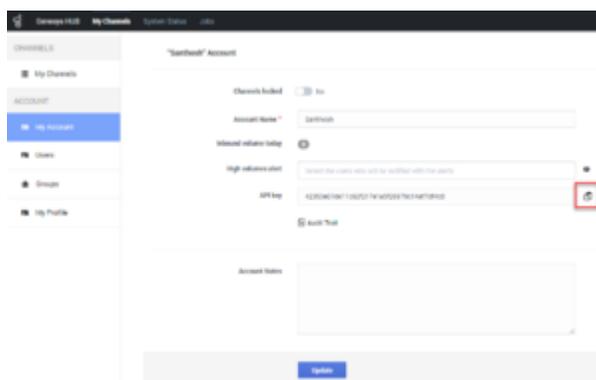
API key

h. At this point, it is not necessary to make any changes to the other fields and attributes on this form.

2. Create a Twitter channel with the type Twitter:Account

The Twitter Channel with channel type 'Twitter:Account' is the mechanism you will use to authenticate to Twitter. Please be ready with your organization's Twitter handle (login) and Twitter password before proceeding.

> ### Important
>
> Your company or organization may use multiple Twitter handles. Step 8 below describes how to handle this situation.

a. Click **My Channels** in the left navigation menu. The **Channels** screen is displayed.

b. Click **+Add Channel** to create a new channel.
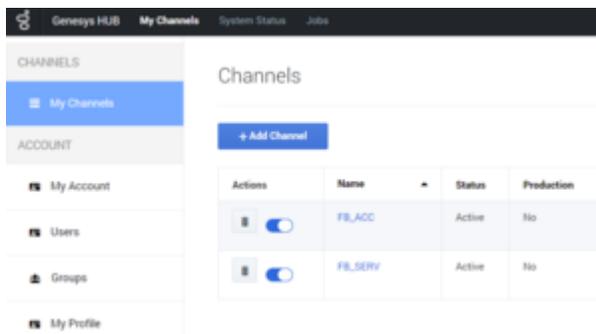
Channels

The **New Channel** window displays.
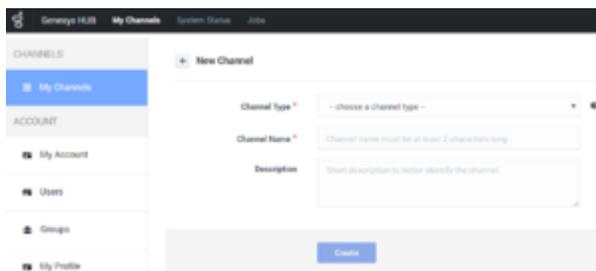
New Channel

c. From the **Channel Type** drop-down, select **Twitter:Account**.

d. Add a Channel Name. Please use the form `<your channel's Twitter handle> - Twitter Account`. Example: `@Genesys - Twitter Account`.

e. Optionally, add a description that indicates the planned usage of the channel.

f. Click **Save and Proceed**.

g. Click **Login to Twitter**.

h. Enter the Twitter credentials for your organization: username (handle) or email, and the password associated with your Twitter account. IMPORTANT: Also check **Remember me**.

i. A window that displays **Access_token successfully saved** indicates that you have successfully authenticated to Twitter.

3. Create a Twitter channel with the type Twitter:Service

A Twitter channel of type Twitter:Service will listen for mentions of your keyword(s) on Twitter.

a. Click **My Channels** in the left navigation menu. The **Channels** screen is displayed.

b. Click **+Add Channel** to create a new channel.

c. In the **New Channel** window (see the figure **New Channel** above):

    i. From the **Channel Type** drop-down, select **Twitter:Service.**

    ii. Add a Channel Name. Please use the convention '<your channel's Twitter handle> - Twitter Service'. Example: @Genesys - Twitter Service.

    iii. Optionally, add a **Description.**

    iv. Click **Save & proceed.**

d. An extended form displays.

New Channel, extended

    i. Click in **Languages** to select one or more languages.

    ii. Set up keywords and exclusions:

- In **Keywords**, type the handle you will be using to listen for mentions, for example @Genesys, then hit Return or Tab. This will have the effect of sourcing all tweets based on the handle that you use. If there is a need, you may source additional posts by populating other words and phrases in the keyword field; for example, #Genesys. The inclusion of words or phrases in the keyword field is the only mechanism for sourcing posts from Twitter. If you have a need to use a broader range of words and phrases, it is important to review Best Practices for Managing Keywords in Twitter Service Channels below.

- In **Exclusions**, type words or phrases for an additional filtration of Tweets. Tweets containing the excluded words or phrases do not enter the system even if the specified **Twitter Handle(s)** are mentioned in those Tweets. To allow Tweets in which the specified Twitter Handle(s) are mentioned, clear the **Use the specified handles as keywords** checkbox.

    iii. Click **Yes** in the **Skip Retweets** option if you want to skip processing Retweets. Skipping retweets means your system will not source tweets that have been retweeted, which may help cut out clutter and noise. You may want to select **No** if you want to analyze retweets and viral activity.

    iv. In **Twitter Handle(s)**, just type the Twitter handle that you will be using to respond, example @Genesys. If you need to create multiple channels for the purpose of responding using different channels, see Using more than one Twitter handle to respond to customers.

    v. Select the **Use the specified handles as keywords** checkbox to always apply the keyword exclusion mechanism (to filter the Tweets) even if the specified **Twitter Handle(s)** are mentioned in the sourced Tweets. Clear this option to allow Tweets in which the specified **Twitter Handle(s)** are mentioned and excluded keywords are present, to enter the system for processing.

    vi. Enter a value ranging from 0 to 3600 seconds in the **RPC cache timeout** field. See RPC cache

timeout for detailed explanation on this setting.

vii. In the **Queue Message Type** field, select the Twitter message types that you want to receive and process. You must enable at least one type of message between **Private** (Direct Messages) and **Public** (Tweets). Additionally, the **Compliance Events** option which is enabled by default, allows you to receive compliance events such as user delete events.

> ## Important
>
> - The Twitter compliance events processing is a mandatory requirement from Twitter. Although you can temporarily disable the **Compliance Events** option if you encounter any issues with the channel and you are debugging the system, it is recommended that you always keep the option enabled.
>
> - For more information on the configuration required for enabling Twitter compliance, see Enable compliance with Twitter.

viii. To ensure the deletion of personal data (Personally Identifiable Information) from Twitter messages after the on-premise Twitter driver fetches the data, click **Do not store personal data**.

> ## Important
>
> This action is not retroactive. Pre-existing personal information remains in the UCS database.

ix. Click **Update and Proceed**.

4. Create a Facebook channel with the type Facebook:Account

A Facebook channel of this type is the mechanism you will use to authenticate to Facebook. Please be ready with your organization's Facebook administrator login credentials for the relevant page(s) before proceeding. For simplicity, please make sure that you are currently logged into Facebook (with this administrator's password) using the same browser that you are using for this setup.

a. Click **My Channels** in the left navigation menu. The **Channels** screen is displayed.
b. Click **+Add Channel** to create a new channel.
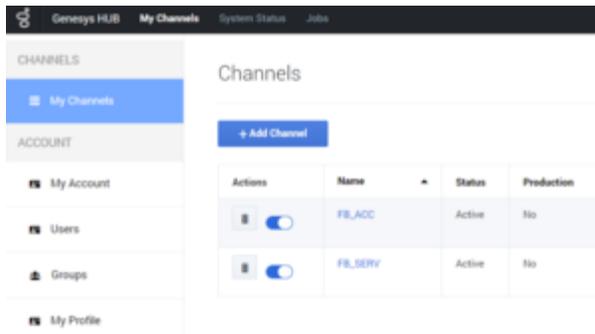
Channels

The **New Channel** window displays.
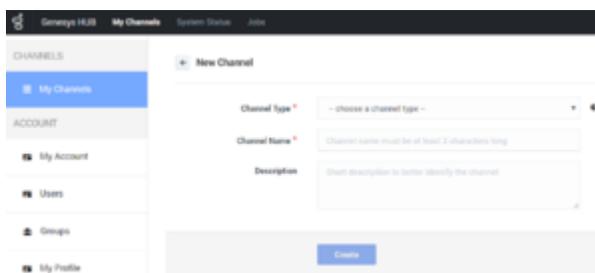
New Channel

c. From the **Channel Type** drop-down, select **Facebook:Account**.

d. Add a Channel Name. Please use the convention <company name> - Facebook Account. Example: Genesys - Facebook Account.

e. Optionally, add a description that indicates the planned usage of the channel.

f. Click **Save and Proceed.**

g. An extended form displays.
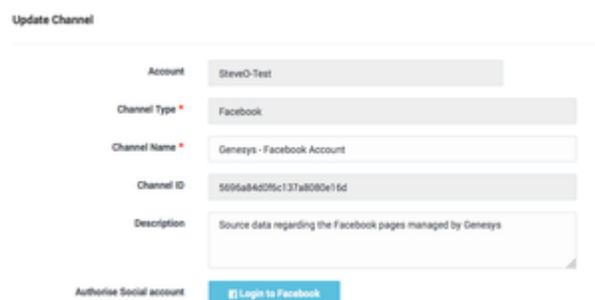
Update Channel

h. Click **Login to Facebook**. A pop-up appears asking you to log in to Facebook
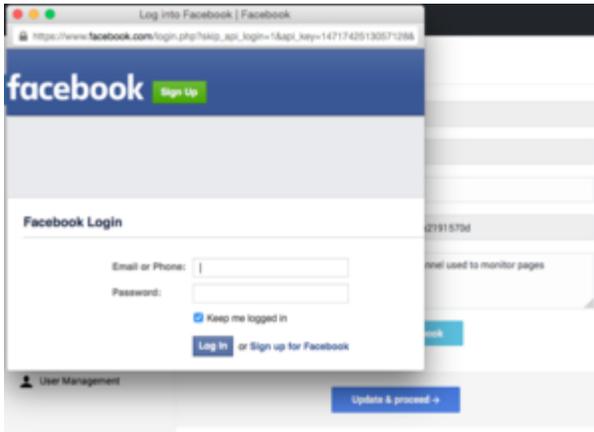
Facebook Login

i. Log in with the admin credentials for the Facebook pages that you want to use. It is important that these user credentials have Facebook admin access to all of the Facebook pages to be used.

j. Provide permissions to the pages you would like to manage for the business integration to work. Select the pages you want to use from Genesys Social Engagement.
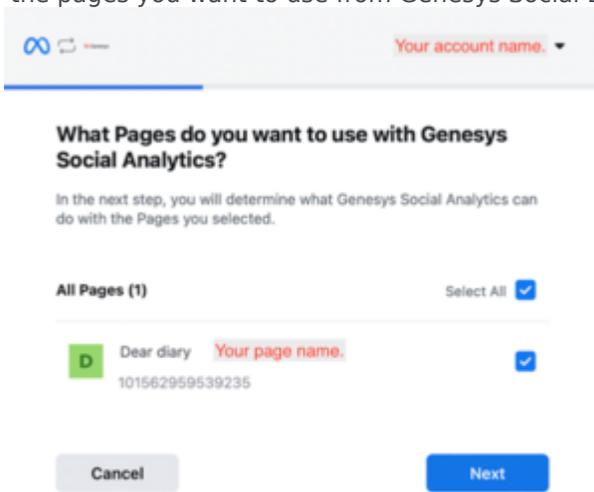
k. For a failproof integration, grant access to all permissions; otherwise, Facebook integration may not function properly. If you are in doubt, consult with Genesys customer care.
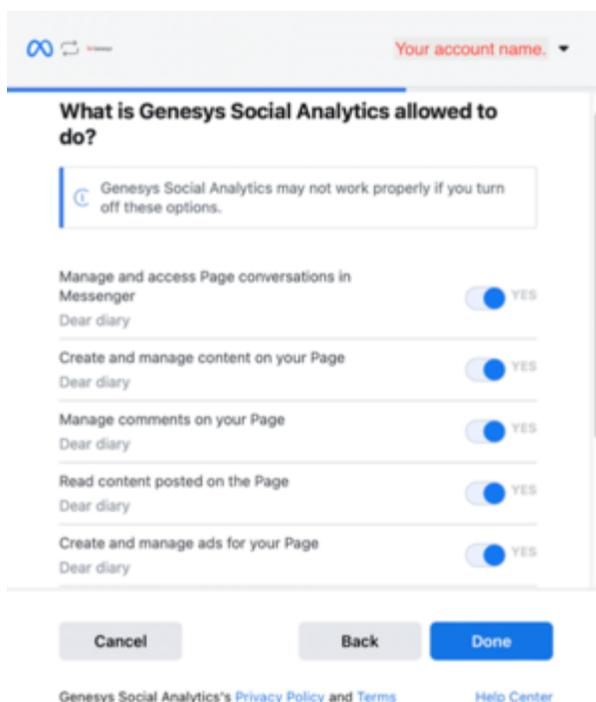
After setting up the permissions a confirmation message is displayed.
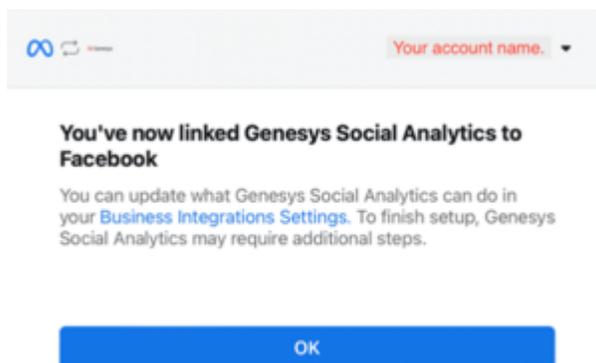
l. Once you have logged in and authenticated you should see a message **access_token successfully saved, close window.** You may close this window.

Important

- If the credentials for the Facebook administrator are changed at any time after configuring the account channel, then login again with the new credentials and click **Update**.

- You can modify the integration permissions any time after linking the Genesys Social Analytics application to your Facebook account. You can modify these settings on the

Business Integrations page within your account.
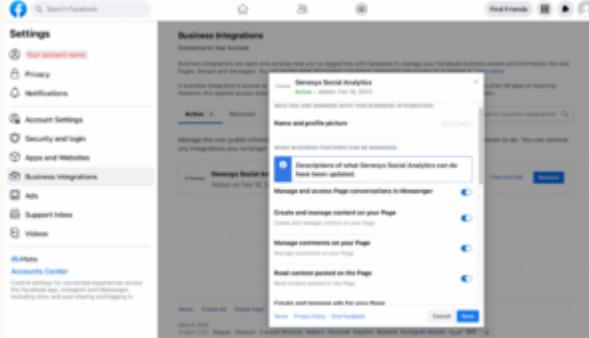
For more information on business integrations and permissions, see:

How do I edit the privacy and settings for my business integrations or remove them from Facebook?

Permissions, Features, and Tasks

5. Create a Facebook channel with the type Facebook:Service

A Facebook channel of this type is used to listen for posts, comments, and messages on Facebook.

a. Click **My Channels** in the left navigation menu. The **Channels** screen is displayed.

b. Click **+Add Channel** to create a new channel.
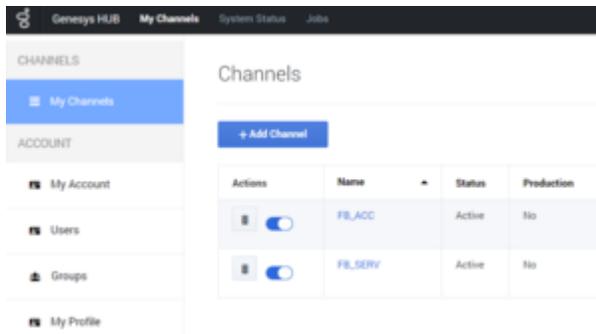
Channels

The **New Channel** window displays.

New Channel

c. From the **Channel Type** drop-down, select **Facebook:Service**.

d. Add a Channel Name. Please use the convention <company name> - Facebook Service. Example: Genesys - Facebook Service.

e. Optionally, add a description that indicates the planned usage of the channel.

f. Click **Save and Proceed.**

g. **Update Channel** displays.

Update Channel

h. Make a note of the Channel ID—it will be needed for a later step

i. Click **Facebook Pages** to get a drop-down list of all of the Facebook pages that the Facebook user is an administrator of. Select each page that you want to monitor.

j. Enter a value ranging from 0 to 3600 seconds in the **RPC cache timeout** field. See RPC cache timeout for detailed explanation on this setting.

k. In the **Queue Message Type** field, select the Facebook message types that you want to receive and process. You can see that both the **Private** and **Public** messages options are enabled by default. Disable the option that does not suit your requirement. Enable the **Ads Interactions** option to receive ad referral events. See Sending a message to verify an interaction for detailed explanation on how to create an ad so the user could send a message and initiate the interaction. Additionally, you can also opt to receive private or public message by configuring the **option name**

> **Important**
>
> You must switch your Facebook account to **Production mode** in your Facebook Account channel. See Production Toggle for more explanation on this setting.

l. To ensure the deletion of personal data (Personally Identifiable Information) from Facebook posts after the on-premise Facebook driver fetches the data, click **Do not store personal data**.

   This action is not retroactive. Pre-existing personal information remains in the UCS database.

m. Click **Update.**

6. Define an Admin user for the account

You will also have to create a new admin user login and password in order to facilitate communication with Digital Messaging Server.

a. Click **Users** in the left navigation menu. The **Users** screen is displayed.

Users

b. Click **+Add User**. The **New User** screen is displayed.

New User

c. In the **First Name** field, type the company's name followed by a 1; for example, Genesys1.

d. In the **Last Name** field, type admin.

e. In the **Email** field, type an email address using a format like the following: Genesys1_Admin@GenSocialEngage.com. Copy and paste this email address to your notepad file as it will be used for a later step of the deployment.

> **Important**
>
> This email address will not be used for sending or receiving emails. It is only used to manage logging in, and

> communications between the cloud and on-premise components of Genesys Social Engagement.

f. Make sure that **Admin** is selected in the **Roles** field.

g. Click **Create.**

h. Now return to **Users**. You should see a list of the users associated with the account that you have set up.

i. Click **Reset Password** for the admin user that you have just created.

j. Enter a new password, and make a note of it (copy and paste to your text file); also make a note of associated email address. You will use them in a later step of the deployment.

7. Configure connections

To configure connections between the on-premise Digital Messaging Server and the cloud-based Account and Channels that you set up in Steps 1 through 5 above, you must set values for certain configuration options.

a. Import the configuration options files, being sure to select **No** in response to **Do you want to overwrite the existing data?**

b. Set option values both the Twitter and Facebook Drivers. The values are based on the setup in Steps 1–6. Be sure that your text file has all of the text that you've copied and pasted clearly identified. Set the option values by copying and pasting the exact values from your text file (complete descriptions of these options are on this page).

Option Values

Option	Value
gsa-account-name	Company/Organization name from Step 1
gsa-api-key	API key from Step 1
gsa-channel-id	Facebook—Facebook:Service Channel ID from Step 5
	Twitter—Twitter:Service Channel ID from Step 3
gsa-channel-name	Facebook—Facebook:Service channel name in Step 5
	Twitter—The exact text used in the Twitter:Service channel name from Step 3
gsa-url-base	socialanalytics.genesyscloud.com/api/v2.0
gsa-user-name	The admin email address from Step 6
password	The admin password from Step 6

Sample values are shown in the following figures (click to enlarge). Note that the values of **gsa-api-key, gsa-channel-id**, and **password** are masked in these figures for privacy.
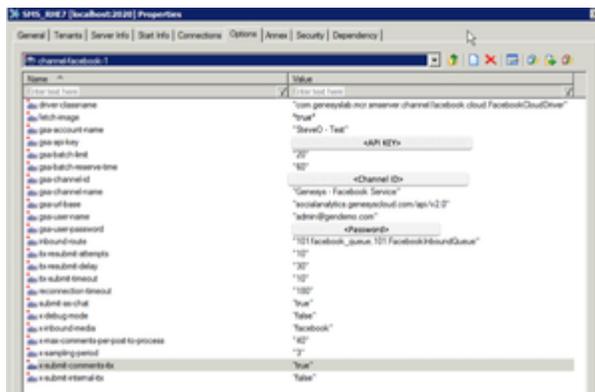
Facebook Sample
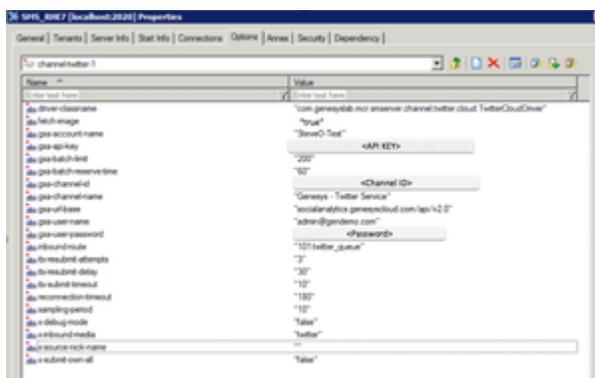
Twitter Sample

c. Test both channels by submitting posts via Twitter and Facebook, and seeing if they appear in the customer's Workspace.

8. Using more than one Twitter handle to respond to customers

Administrators can configure multiple Twitter handles using a single Twitter Service channel in Genesys Hub. This feature allows agents to select a Twitter handle from which the reply message is sent to the brand's user.
Follow these steps to configure multiple Twitter handles:

1. Add a Twitter Account channel for each Twitter handle that you wish to add.

2. Access the **Update Channel** page of the Twitter Service channel.

3. Enter the Twitter handle names in the **Twitter Handle(s)** field.
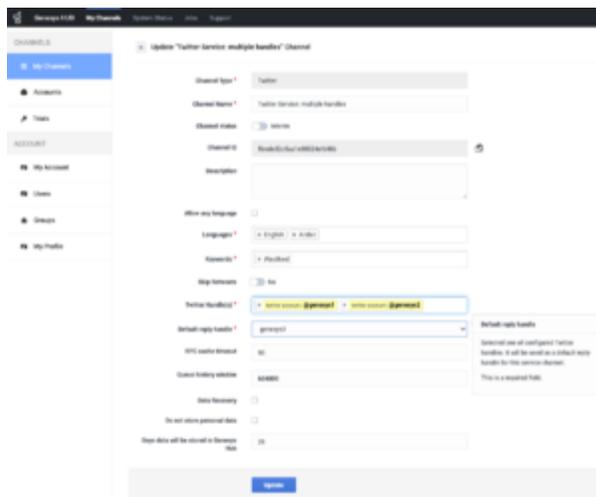
Muliple Twitter handles

4. Enter the default handle in the **Default reply handle** field.

5. Click **Update** to save the settings.

Upgrading drivers

Depending on your environment, follow these steps to upgrade Genesys Cloud API Driver for Twitter and Genesys Cloud API Driver for Facebook.

For Windows

1. Stop backup DMS using GAX or SCI.

2. Navigate to **Control Panel** and locate **Genesys Cloud API driver for Twitter** or **Genesys Cloud API driver for Facebook**. Uninstall it.

3. Find **setup.exe** file in the newer installation package and run it.

4. Select DMS which has been stopped and install the driver(s).

5. Start backup DMS.

6. Switch over and repeat **Step 1** to **Step 4** for primary DMS.

For Linux

1. Stop backup DMS using GAX or SCI.

2. Navigate to `media-channel-drivers` directory in the DMS install location.

3. Delete the older install dirs `channel-twitter` or `channel-facebook`.

4. Find the **install.sh** file in the newer installation package and run it.

5. Select DMS which has been stopped and install the driver(s).

6. Start backup DMS.

7. Switch over and repeat **Step 1** to **Step 5** for primary DMS.

Production Toggle

You can toggle between production and non-production (lab, staging, test) modes using a switch in Hub.

1. Log in to Hub.

2. Click **Channels** in the left-hand menu to get a list of the channels you have access to.

3. Select a channel and click **Edit**.

4. Slide the toggle to the right to engage **Production mode**.
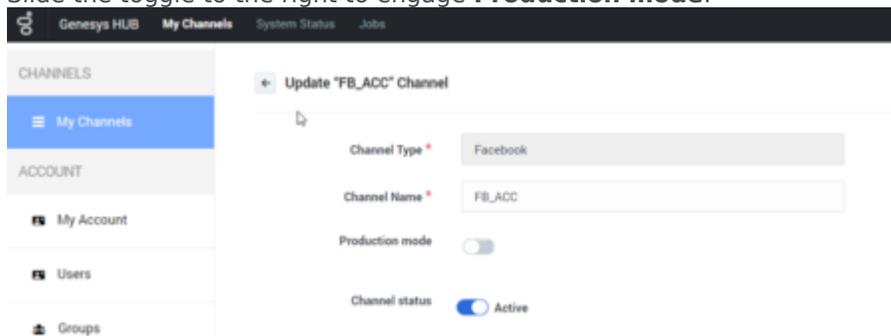
Note the following:

- Internal Service Level Agreements (SLAs) apply only to accounts in production mode.

- Genesys carries out recovery, or assists with it, for Production accounts only.

- Production mode is indicated in reports.

- Production mode requires all required licenses to be in place.

- Switching to **Production mode** creates a distribution list to send emails and updates in the Hub Status page.
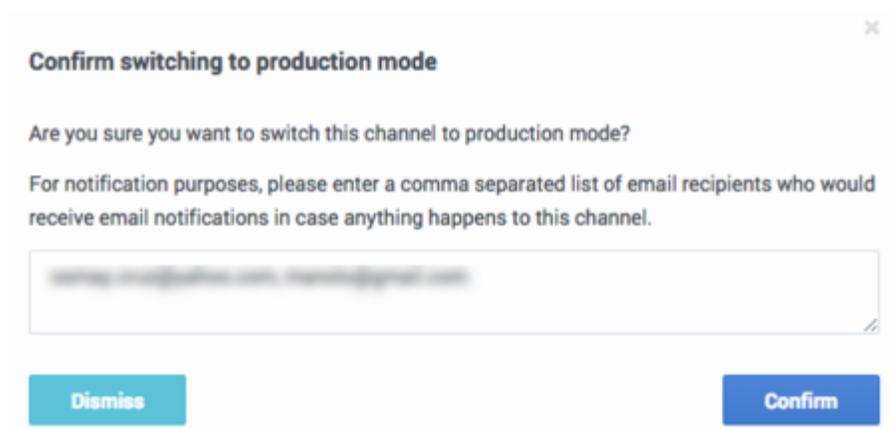
RPC cache timeout

The RPC cache timeout, in seconds, is used for caching messages that agents might send repeatedly over a period. The purpose of this timeout is to prevent accidental loops in workflow or automated agents (chatbots) from sending duplicate messages too often (quicker than the specified timeout).

For example, if you enter 3600 (3600 seconds or one hour) in this field and the driver sends the same message repeatedly, Hub will not forward the message from the agent more than once in a duration of 3600 seconds (one hour). Additionally, each new attempt to send a duplicate message resets the timeout.

The default value is 90. The value 0 disables the timeout.

> **Tip**
> If you are planning to use chatbots, Genesys recommends that you set a smaller value or disable the timeout by setting the value to 0. Chatbots are expected to send duplicate messages.

Best Practices for Managing Keywords in Twitter Service Channels

When setting up a Twitter:Service channel, you have the option to add any text in the Keyword field. It is important to use only appropriate keywords. If your keywords are very common or popular, your inbound feed may be cluttered with too many useless posts. In extreme scenarios, Twitter may cut off access to data if the data volumes are too high. This might occur for example if you were to input keywords such *#awesome* or *hello*.

Warning

If a channel's inbound traffic exceeds 300 tweets per minute for a certain keyword, the keyword is removed from the channel automatically. The keyword can be added back by the admin account after 3 days, when the keyword gets unblocked. However, users can request the Genesys representative to add the keyword back before the 3 days block period expires. Users can run recovery on the missing data after the keyword has been added back and there is no risk of the keyword getting blocked while data recovery is running as the recovery uses a different API.

If one were to set up a channel to monitor mentions of Genesys on Twitter, some appropriate keywords and phrases would include: *@Genesys*, *#Genesys*, and *Genesys software*.

It is essential to check that keywords you use are not too broad or ambiguous. Go to https://twitter.com/search-home and check the keyword(s) you plan to use (one at a time). You will need to view the search results and assess the results. If there were a company called "United Ultra Local Bank Inc." one might be inclined to use the keyword *#United.* This would be a mistake, as it would source a flood of unnecessary posts from Twitter users that are submitting posts relating to *#United Nations*, *#United States*, *Manchester #United*, and so on. Even worse would be *#Check, savings account, #balance,* or *overdraft* as these are even more generic.

Languages filter

You can configure the supported languages for Twitter interactions using the **Allow any language** option or **Languages** field in the **Update Channel** page in Genesys Hub. Tweets in the supported languages only are downloaded and displayed to agents. Even if a Tweet matches your keyword, the Tweet is not downloaded if the language is not supported as per the channel configuration.

You can select the **Allow any language** option to allow Tweets in all languages or you can specify supported languages in the **Languages** field. Selecting **Allow any language** hides the **Languages** field.

Sending a message to verify an interaction

You can create and use ads that click to Messenger to begin a conversation. You can also customize your conversations in Messenger to meet your business specific needs.

1. Refer to https://developers.facebook.com/docs/messenger-platform/discovery/ctm-ads#createad to create an ad. You can create using an image, video, or carousel ad post, and also setup a greeting message, quick replies, and so on.

> ### Important
> Facebook may update the UI eventually and you end up creating a new ad. It is recommended to use one of your tracked Facebook pages you have configured in the service channel during this ad setup.

1. Once you create your ad, install the Facebook Messenger mobile application. Remember to login with the same account that you are using in the Ads manager.

2. Go to the **Ad Preview** window and click **Share → Preview on device → Preview Message**. An Ad account block warning displays asking you to publish the ad first to view the **Preview message** menu. This triggers the review process, which may end up with rejection. Note that your ad account will be blocked on repeated rejections.

- You will receive an ad preview to your device and on interacting with the ad, a **referral** event is received into the channel.

Frequently asked questions

Can I use proxy between Genesys Hub and DMS?

You can configure DMS to use HTTP proxy. See Other DMS Configuration for information on enabling proxy server.

Do Genesys Hub and DMS use a load balancer between them?

DMS, Genesys Hub, and Social Engagement drivers require a single host to connect to.

Can a third-party security solution such as Trend Micro be used to scan interactions for threats before reaching on-premise components?

Assuming that Trend Micro security divides traffic into several routes, the suggested setup is:

```
[DMS] > [reverse proxy] > [Trend Micro pool] > [Genesys HUB]
```

Which part of the Social Engagement traffic ends in Genesys Hub?

All Social Engagement traffic ends in Genesys Hub. There is no pass-through traffic, as Hub does some additional processing before passing it further to DMS.

Does Genesys Hub perform any type of traffic scanning?

No. Hub does not scan the traffic.

Does Genesys Hub take any action if a malicious file is found?

Hub does not scan the attachments that are sent or received from social media.

How are interactions with attachments handled?

- Facebook attachments are sent as URLs. The Facebook driver fetches this data directly from Facebook.
- Twitter DM attachments are stored as links, but they are fetched from Hub as Twitter requires OAuth 1.0 authorization for these media links.

DMS uses these links to download the attachments and save them in UCS where they are available for WDE for further handling.

Can Genesys Hub be integrated with third-party software such as Splunk and Trend Micro?

No. Genesys Hub does not integrate with these third-party applications. However, it is possible to configure them in an on-premise environment.

What is the type of authentication used between drivers and Genesys Hub?

A token-based authentication is used. The drivers send the username, password, and account token to acquire a unique authentication token valid for 24 hours. This authentication token is used to authenticate requests to Hub.

Does Genesys Hub store any data?

All data received from social media platforms is stored in Genesys HUB for a limited time. The data retention period is 28 days.

Creating an Apple Messages for Business Channel

Starting from the 9.0 release, Genesys Hub supports Apple Messages for Business and includes an API connector for Apple Messages for Business. This section describes how to create an Apple Messages for Business channel using Genesys Hub.

Preparing for Hub Integration

You must contact Apple and get your business ID before proceeding with channel creation in Hub. After registering with Apple and choosing Genesys as your Customer Service Provider, you are greeted with a Genesys welcome message. The welcome page shows your business ID and name.

Thank you for choosing Genesys as your Customer Service Provider (CSP).

To set up your Apple Business Chat channel in our Genesys Hub, please have the following information available that was provided to you by Apple during the registration process:

- Apple Business ID: 168628286282
- Business Name: SuperBusiness007

Next, we will take you through the process of setting up your ABC channel. This is a two-step process:

- Create your Genesys Hub account page (can be skipped, if you already have one)
- Create your ABC channel in Genesys Hub

Continue

You must go through a two-step process to set up your Apple Messages for Business channel in Hub. Click **Continue** to proceed.

1. Hub account creation (You can skip this step if you already have a Hub account)
2. Apple Messages for Business channel creation

1. Creating a Hub Account

The first step of deploying an Apple Messages for Business channel is to create an account within the Hub component of Social Engagement. Click **Continue** if you are a new user and you want to create a Hub account. Refer to the Create an Account section for instructions on how to set up an account.

You can also log in with your existing account if you are already a registered Hub user. In this case, enter your user name and password and click **Login**.

2. Creating an Apple Messages for Business Service Channel

1. The **Create your Apple Messages for Business Channel** screen appears after you log into Hub. By default, the channel type is selected as Apple Service Channel. The channel name and business ID are automatically populated. However, you can modify the values if required.

2. Click **Create channel**. The new channel is created and the channel update screen is displayed.

3. Enable **Production mode**.

4. Enter your business ID in the **Business IDs** field.

5. Enter a value ranging from 0 to 3600 seconds in the **RPC cache timeout** field. See RPC cache timeout for detailed explanation on this setting.

6. Click **Update**.

After the channel is created, you can activate or suspend the channel using the **Actions** in the **Channels** screen. Inbound messages are fetched and outbound messages are sent as long as the service channel is active.

Configuring Payment Merchants for ApplePay

1. Select **Show Apple Pay Information** on the channel update screen.

2. Enter the merchant ID in the **Merchant ID** field. This value must be unique.

3. Enter a merchant name in the **Merchant Name** field. This name must be unique.

4. Enter the merchant domain in the **Merchant Domain** field.

5. Select the business IDs that must be associated with this merchant account. You can only select business IDs that are already linked to the channel and you cannot reuse a business ID that is already associated with another merchant account.

> ### Important
> A merchant can be associated with multiple business IDs whereas a business ID can only be linked to one merchant.

6. Provide the PSP API key in the **PSP API Key** field.

---

7. Enter a valid URL in the **Fallback URL** field. This URL is used to redirect users when there is an error in payment processing.

8. Click **Create Merchant** to add the merchant account. You can add multiple merchant accounts as long as **Merchant ID** and **Merchant Name** are unique to each merchant.

9. Click on the merchant ID to add verification and certification files.

10. Upload the required certificate files using the **Additional verification file** and **Certificate file** fields. You can get the domain verification file and certificate file from https://developer.apple.com.

11. Click **Update Merchant Data**.

You can delete the merchant accounts using the **Delete Merchant** action in the channel update screen.

Creating a WhatsApp Channel

Genesys Hub supports WhatsApp Business and includes an API connector for WhatsApp. The WhatsApp channel allows consumers to connect with brands and brands to connect with consumers from the WhatsApp Messenger app on their smartphone. This document describes how to create and activate a WhatsApp channel in Genesys Hub.

This topic contains the following sub-topics:

- Prerequisites
- Creating a Hub account
- Creating a WhatsApp channel
- Registering a WhatsApp channel
- Activating a WhatsApp channel
- Migrating your existing phone number from other CSP to Genesys
- Adding a business profile

Link to video

Prerequisites

> **Important**
>
> Brands must obtain the required approvals from WhatsApp to use WhatsApp Business. Purchasing a Genesys Engage product from Genesys does not constitute an approval by WhatsApp to use the software. For more information on WhatsApp policies, refer to https://www.whatsapp.com/legal/commerce-policy/ .

- You must have a designated business number that complies with the WhatsApp requirements and is able to receive voice calls and text messages (SMS). For information on the requirements, refer to https://developers.facebook.com/docs/whatsapp/guides/phone-number.

- You must have a valid GARN code to complete the WhatsApp on-boarding setup. When you buy a Genesys product, you receive a GARN code which is used for billing purposes.

Creating a Hub account

The first step of deploying a WhatsApp channel is to create an account within the Hub component of Social Engagement. Refer to the Create an Account section for instructions on how to set up an account. You can also log in with your existing account if you are already a registered Hub user.

Creating a WhatsApp channel

1. Log on to your Hub account via https://socialanalytics.genesyscloud.com .

   ### Important
   We recommend that you always use https://socialanalytics.genesyscloud.com to access Hub. But if you prefer a static URL, you can alternatively use https://static.socialanalytics.genesyscloud.com .

2. Click **Add Channel**.The **New Channel** page is displayed.

3. Select **WhatsApp: Service** from the **Channel Type** drop-down list.

4. Choose **Genesys Engage Premise** from the **Platform** drop-down list.

5. Enter your business phone number in the **Business Phone Number** field.

   ### Important
   - If you want to create more than one WhatsApp channel, you must use a unique phone number for each channel.

   - If your phone number is registered with other CSP (Content Service Provider) and you want to migrate to Genesys, you can select the **Migrate a phone number** option. For more information, see Migrating your existing phone number from other CSP to Genesys.

6. Enter a channel name and description.

   ### Important
   Channel name is used as the phone display name in WhatsApp and it is visible to consumers interacting with the brand in WhatsApp Messenger. You must ensure that the name complies with WhatsApp policies. For more information on WhatsApp policies, see https://developers.facebook.com/docs/whatsapp/guides/vname .

7. Click **Create**. The channel is now in the CREATED stage.

The channel goes through the following stages in the activation process:

1. CREATED - The first stage after channel creation.

2. INITIATED - The channel is under review by Genesys.

3. VERIFIED - The channel information was reviewed and is correct.

4. REGISTERED or REJECTED - The channel can be registered or rejected by Genesys team based on the provided channel data.

5. ACTIVATED - The channel is activated and is enabled for WhatsApp Business.

> ### Important
> The **Production mode** toggle becomes visible only when the channel reaches the ACTIVATED stage .

Registering a WhatsApp channel

You must request Genesys to register your channel before proceeding with activation. After you initiate this request, the Genesys team starts verifying, provisioning, and configuring all the required infrastructure for your business contact number to function and service your consumers.

1. Log on to your Hub account via https://socialanalytics.genesyscloud.com .
2. Access **My Channels** and click on your channel name. The **Update Channel** page is displayed.
3. Enter email addresses of the contacts who must be notified on events related to the channel in the **Notify emails** field.
4. Click **WABA Details**. A form to enter your WhatsApp Business Account details is displayed.

5. Fill in your WhatsApp Business Account details along with your company representative's contact information and click **Update WABA**.

> **Tip**
>
> - If your Hub account has another WhatsApp channel with WABA details already filled in, select the channel from which you want to import the details in the **Populate Details from another channel** drop-down list.
>
> - If you have purchased Genesys WhatsApp Messaging Solution from a partner, select **We purchased Genesys Messaging for WhatsApp from a partner** and enter the partner contact details in the **Partner Contact Details** section.

6. Click **Initiate** to request Genesys for a review. A confirmation message is displayed indicating that the request to review and register the channel has been received by Genesys. The channel is now in INITIATED stage.

Current Stage   INITIATED

You may be contacted by your Genesys representative to verify your WhatsApp channel, so make sure that all email addresses for the users registered in your account are valid. Once the initial validity has been checked, Genesys will set the channel state to VERIFIED. After Genesys completes the full review, you will receive an email indicating whether your request was approved. Your channel will now have one of the following states and your next step can be:

- REGISTERED - Activate the channel using the **Activate** button.

- REJECTED - Update the channel data such as phone number and channel name, and initiate the review again using the **Initiate** button.

> ## Important
>
> - You cannot edit the business phone number and channel name when your channel is in INITIATED stage. If you want to update these details, contact your Genesys representative.
>
> - If your channel is rejected, contact your Genesys Representative to understand the reason for rejection.
>
> - When your WhatsApp channel reaches the REGISTERED stage, the channel remains as REGISTERED for a maximum of two weeks until activated or rejected. After this period, you must initiate the channel registering process again.

Activating a WhatsApp channel

You can proceed with activation as soon as you have received an email from Genesys confirming that your channel is registered.

1. Log on to your Hub account via https://socialanalytics.genesyscloud.com .

2. Access **My Channels** and click on your channel name. The **Update Channel** page is displayed.

3. Ensure that the current stage is shown as REGISTERED and click **Activate**. A window is displayed for a PIN activation process.

> ## Tip
>
> If you have selected the **Migrate a phone number** option during channel creation, the **Activate** button is not displayed. Additionally, the channel is automatically activated after the migration process is completed.

4. Click **Request PIN**.

5. Select a mode of communication to receive the PIN and click **Next**.

6. After receiving the PIN, enter the PIN and click **Activate**. Your channel is activated.

Migrating your existing phone number from other CSP to Genesys

You can migrate a phone number from other content service provider to Genesys.

1. Create a WhatsApp channel. Enable the **Migrate a phone number** option and enter the existing phone number while creating the channel. See Creating a WhatsApp channel.

2. Register the WhatsApp channel. While registering, you must enter your Facebook Business ID in the WhatsApp Business Account form. See Registering a WhatsApp channel.

> ### Tip
> To find your Facebook Business ID, see Find your business ID in Business Manager.

3. After your channel is approved and registered by Genesys, navigate to the **Update Channel** page, and click **Migrate Phone Number**. The **Migrate phone number** pop-up window is displayed.

4. Click **Initiate migration** and follow the activation process. See Activating a WhatsApp channel

5. After entering your PIN and clicking **Submit**, your phone number is migrated and the channel is activated.

Adding a business profile

After your channel activation, you can add a business profile to the channel.

1. Click **Business Settings** on the **Update Channel** page. The **Profile Settings** screen displays.

2. You can upload or edit your business profile picture using the **Click to edit photo** option.

3. Enter a profile description in the **Profile About** field. This field is mandatory.

4. Provide information about your business such as address, email, industry, and website. For more information on the WhatsApp business verticals that are displayed in the **Business Industry** drop-down field, see https://developers.facebook.com/docs/whatsapp/api/settings/business-profile#verticals .

5. Click **Update Settings** to save the business profile.

Viewing WABA Billing

WhatsApp billing analytics is available for customers with WhatsApp Business Accounts (WABA) managed by or shared with Genesys. Follow these steps to view the detailed conversation analytics for the configured WABA:

1. Access the WhatsApp channel page and click **WABA Billing**. A pop-up window is displayed.

2. Select a date range. The billing analytics pertaining to the selected period are displayed.

3. Click **Download CSV** to export the analytics to a CSV file.

WhatsApp Embedded Signup

WhatsApp Business Messaging from Meta allows consumers to connect with companies and brands from the WhatsApp messaging app on their smartphones. It offers a rich consumer experience, integrated inside of notification, and contact center software. Genesys Messaging for WhatsApp allows brands to manage the (human and virtual) agent side of the WhatsApp experience from within Genesys Engage.

This onboarding guide provides instructions for setting up WhatsApp channels in Genesys Hub through the WhatsApp Embedded Signup process and guides you through the process of creating a shared WhatsApp Business Account (WABA) and independently managing your business account.

This guide does not cover the procedures for downloading and installing Genesys Engage on-premises or deploying WhatsApp in Genesys Engage Cloud. Onboarding into Genesys Cloud or PureConnect is not covered by this guide, either. Please reach out to your local account executive for help with these other Genesys offerings. If at any time you are stuck or need help, please reach out to Customer Care or Engage.WhatsApp.Requests@genesys.com.

The Embedded Signup features enables:

- Significant acceleration of onboarding, making it easier for you to scale with the WhatsApp Business Platform.

- Reduced onboarding time from days to minutes. The new onboarding process combines multiple steps to a single flow. It connects your Meta Business Manager accounts and WhatsApp Business Accounts (WABAs) to Genesys Engage, as well as verifies and registers your phone numbers.

- Create and own your own WABAs and share access to it directly with Genesys Engage Hub Account as part of the signup flow. This new process is unlike the current process, where Genesys creates and manages WABAs on-behalf-of customers.

- After signup and activation of your first WhatsApp number, you can log in into your Meta/Facebook Business Manager using https://business.facebook.com/ to access your WABAs and have complete control of the following WhatsApp assets:

  - Phone Numbers (including the WhatsApp Business Profile for each number)

  - Message Templates

  - WhatsApp Insights Data/Reports

Prerequisites

> **Important**
>
> If you want to move existing WhatsApp numbers and a WABA that were previously activated through the Genesys Engage manual onboarding process to the Embedded Signup flow, please refer to the section called **Migrating from Manual Signup to**

Embedded Signup in this document.

Brand's Own Meta/Facebook Business Manager Account

You must have a Meta/Facebook Business Manager Account.

Refer to https://www.facebook.com/business/help/1710077379203657?id=180505742745347 for more information about how to create an account.

The brand that interacts with WhatsApp users owns the business manager account. A business manager that a partner, integration resource, or ad agency owns is not accepted for customers. When you set up the WhatsApp Integration in Genesys Engage you must be able to log in to the Meta/Facebook business manager

Approval by WhatsApp / Business Verification

WhatsApp will review and must approve each account and channel before allowing the brand to operate on WhatsApp. Purchasing Genesys Engage from Genesys does not constitute an approval by WhatsApp to use the software.

WhatsApp restrictions, which must be enforced by Genesys:

- Brands cannot send messages to Syria, North Korea, Cuba, Iran, and three sanctioned regions in Ukraine (Crimea, Donetsk, Luhansk).

- Governments cannot operate on WhatsApp without special permission and use cases. To apply for an exception, please contact Genesys.

- Brands from certain industries are prohibited to operate on WhatsApp. To learn about WhatsApp Commerce Policy, visit https://www.whatsapp.com/legal/commerce-policy .

Designated Phone Number(s) for WhatsApp

The brand needs to have at least one designated business phone number to start using WhatsApp. Each phone number must comply with WhatsApp's requirements to be able to receive phone calls or text messages.

Make sure that you have valid phone numbers to register on the WhatsApp Business Platform, along with the WhatsApp display names to use for each number that you register. The phone number for your business must meet the following criteria:

- Is owned by the business

- Has a country and area code, such as landline, mobile numbers, or toll-free numbers

- Must be able to receive voice calls or SMS

- Must not be a short code

- Is not used with the WhatsApp Business Platform or the WhatsApp Messenger/Consumer app, or the WhatsApp Business App

> **Important**
>
> If you intend to use a phone number already registered with the WhatsApp Consumer or Business App refer the below links.

- https://developers.facebook.com/docs/whatsapp/phone-numbers#migrate to migrate customer app phone number to the WhatsApp Business Platform

- https://developers.facebook.com/docs/whatsapp/business-management-api/guides/migrate-phone-to-different-waba to migrate phone number to a different WABA (WhatsApp Business Account)

- If you plan to use a phone number already registered with WhatsApp or the WhatsApp Business App, refer to the link below for instructions on how to delete your account from the mobile app first, before going through the embedded signup:
  https://developers.facebook.com/docs/whatsapp/cloud-api/get-started/migrate-existing-whatsapp-number-to-a-business-account

Purchase WhatsApp Licenses / Genesys GARN Code

The brand or the partner needs to purchase all required WhatsApp subscription licenses, including WhatsApp Seats, WhatsApp Hosting Fees per channel, and WhatsApp Incidentals. Genesys will not continue until Genesys has a purchase order in hand from the brand or the brand's partner.

When purchasing any Genesys product, the brand receives a GARN code by Genesys, which is used for billing purposes. The admin of the WhatsApp solution will need to provide the brand's GARN Code as part of the WhatsApp setup. Without a valid GARN Code, Genesys will not be able to finish the onboarding setup in Genesys Hub. If you do not know your brand's GARN code, please contact your local account executive

Sign Social & Messaging Contract Addendum

Customer or partner must sign a services order for WhatsApp subscription licenses, hosting fees, and incidentals from Genesys, as well as the Social & Messaging contract addendum.

Your service order will automatically include the Social & Messaging terms of service during the contracting process. This step confirms your agreement to adhere to WhatsApp's Business and Commerce policies and to acknowledge your responsibility for any pass-through charges from WhatsApp, referred to as **Incidentals**, which may be incurred when using message templates.

Setting Up a WhatsApp Channel in Genesys Hub

To start the onboarding process, the partner or the brand should create an account in Genesys Hub and then create a WhatsApp channel.

Creating an Account in Genesys Hub

To start the onboarding process, the partner or the brand should create an account in Genesys Hub and then create a WhatsApp channel. Refer to the Create an Account section of our documentation

for instructions on how to set up an account. You can also log in with your existing account if you are already a registered Genesys Hub user.

Creating a WhatsApp Channel

1. To create a WhatsApp channel, click **Add Channel**, choose **WhatsApp: Service** and then fill in the fields on the page and click **Initiate**.

2. Genesys will review your details and create the enterprise hosting container for your phone number. Once the channel is approved by Genesys, the channel status will be marked as **Registered**, and this will enable the embedded signup process. You will receive an email at this step.

Creating a New WABA using Embedded Signup

Log in to Meta Business Manage

To log in to the Meta Business Manager, perform the following steps:

1. In your Hub Channel Account, please click on the **Log in with Facebook** option. If you don't find the **Log in with Facebook** button, kindly send an email to Engage WhatsApp Requests engage.whatsapp.requests@genesys.com with your Hub account details. Once you have access to this button, you can continue to the next step. In the Embedded Signup Flow dialog box, log in to your Meta Business Manager.

2. If you are already logged into your Business Manager within your web browser, simply click **Continue**. The system will utilize the same login credentials. Alternatively, you can choose to log in with a different Facebook account.
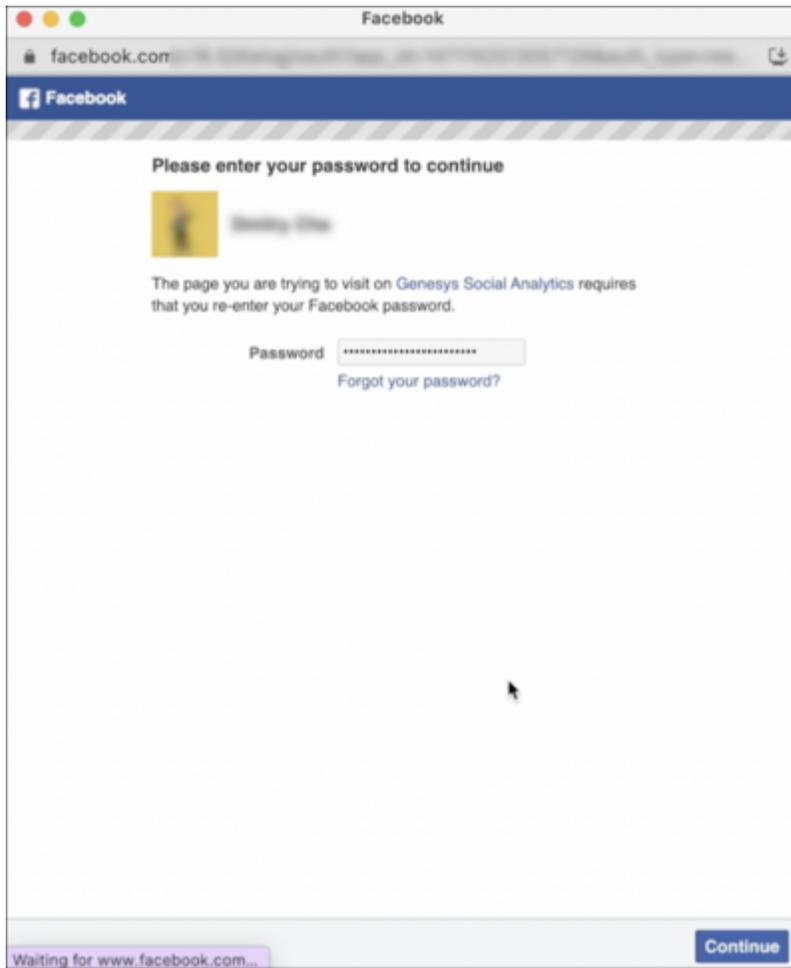
3. Click **Continue**. This login method enables Genesys to access and link information associated with your Meta and WhatsApp Business Accounts to your Genesys Engage account.
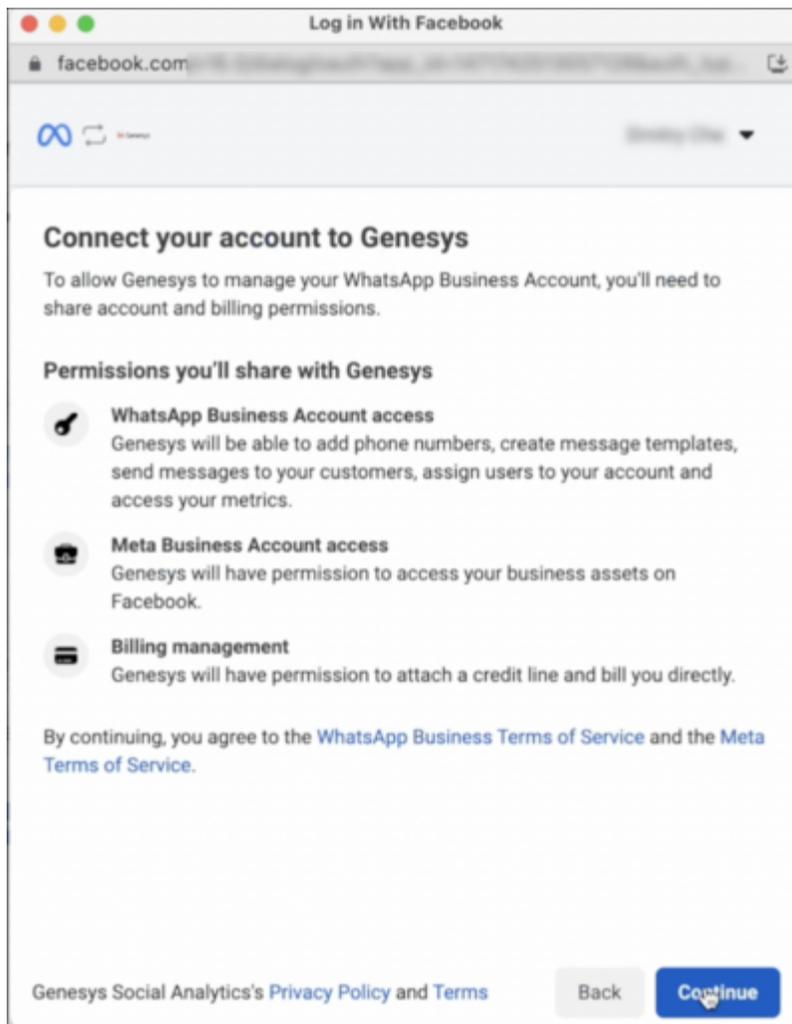
Fill in your Business Information

1. After you log in, click **Get Started** > **Continue** to connect your account to Genesys Engage.

2. Select an existing Meta Business Account from the list.

3. Choose the appropriate option and create the new Meta Business Account.

Note: Verify new or existing Meta business accounts separately in your Meta Business Manager. For more information about how to verify your business in Business settings, see https://www.facebook.com/business/help/2058515294227817?id=180505742745347. You can skip the verification during signup. However, until Meta verifies your business, your WhatsApp number is only active for a 30-day trial period.

If Meta rejects your business, the trial period ends with immediate effect. For this reason, Genesys recommends that you use the number for production traffic until Meta verifies the business. If a business account is verified, the business must pass other WhatsApp checks, such as display name and commerce policy, before they can send a high number of messages. Until these checks are

complete, the business has access only to the unverified trial experience.

Create or Select your WhatsApp Business Account

To select a WhatsApp business account and business profile, perform the following steps:

1. If you are an existing Embedded Signup flow user and created a WABA previously, then select an existing WABA from the drop-down and create a new WhatsApp Business Profile.

> **Important**
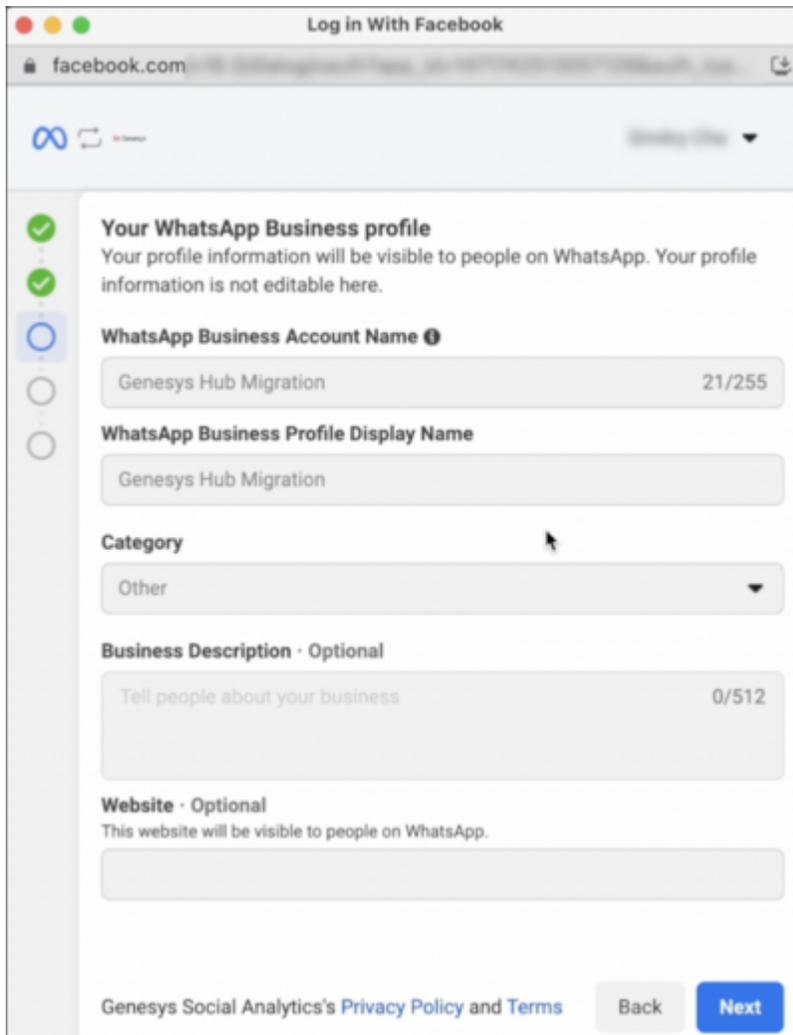> You can only edit the Business Profile (phone profile) Display Name and not the WABA name.

2. If you are using an embedded signup flow for the first time, create a new WhatsApp business account and business profile (your phone profile).
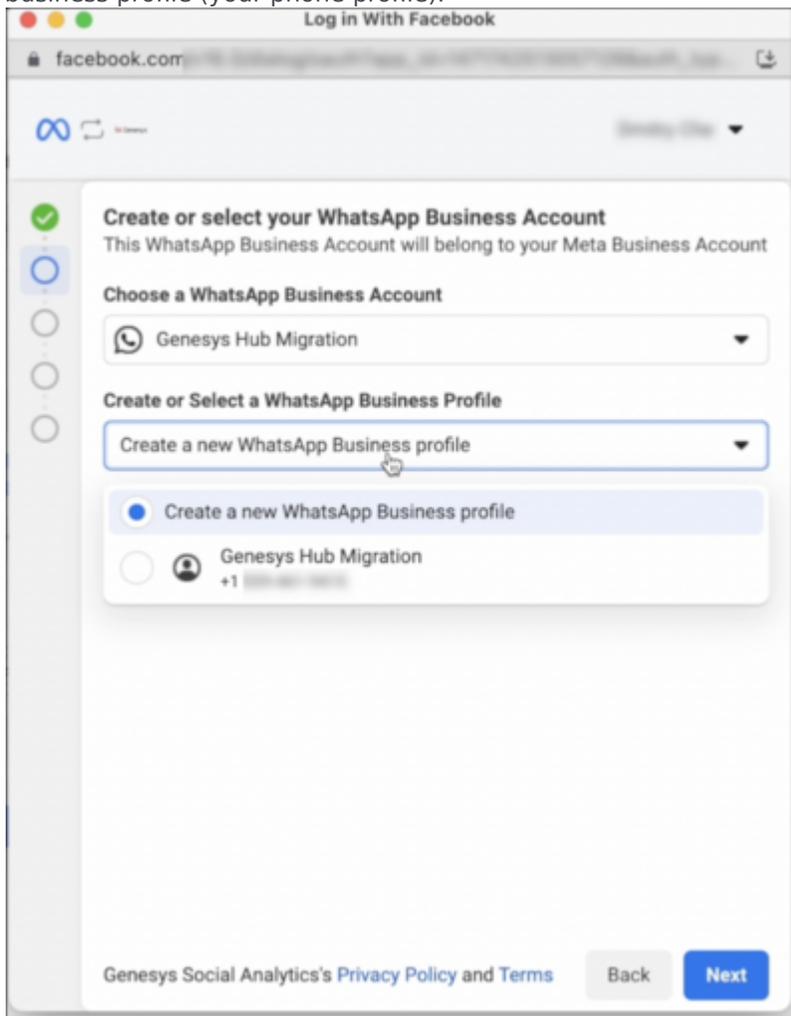
3. In the **Create a WhatsApp Business Profile** page, complete the WABA and profile information.

> **Important**
>
> See https://www.facebook.com/business/help/757569725593362 for more information on the business profile display name guidelines to ensure that the business profile display name complies with https://www.whatsapp.com/legal/commerce-policy and https://www.whatsapp.com/legal/business-policy/ . The business profile display name must also represent your business, be consistent with external branding, and have a clear relationship with your business.

Verify your business phone number

To verify and register your phone number, perform the following steps:

1. In the **Phone Number** field, enter your WhatsApp phone number.

2. Choose a verification method. If you choose to verify by phone call/voice method, the number should not be behind an IVR system. If the number is behind an IVR system, then to receive the verification

code, temporarily reroute voice calls to another mobile or landline.
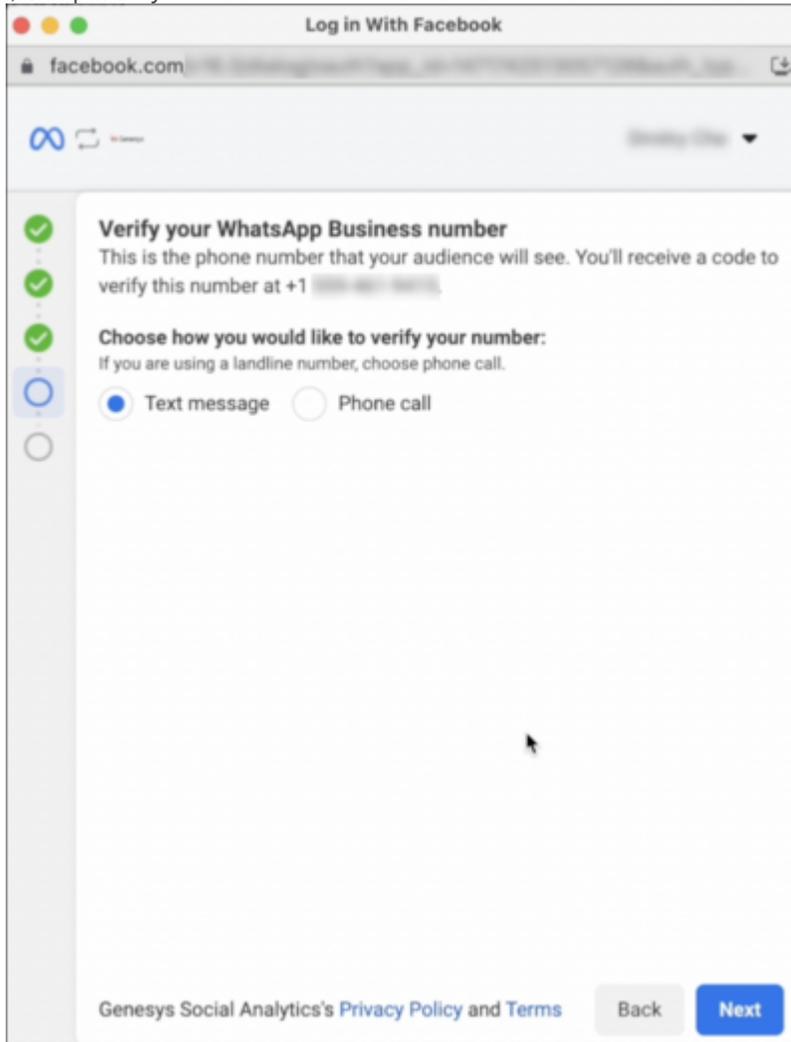
> **Important**
>
> You can only add and register one phone number at a time via the Embedded Signup flow. If you try to add a phone number that is already registered with a WhatsApp Consumer or Business App, please refer for more information about how to delete your account from the mobile app first, see https://developers.facebook.com/docs/whatsapp/cloud-api/get-started/migrate-existing-whatsapp-number-to-a-business-account for information on how to migrate an existing WhatsApp Number to a Business Account].

3. After you add your number, enter the six-digit verification code that you receive via SMS or voice.

4. Click **Next**.

5. When the verification completes, click **Finish**.
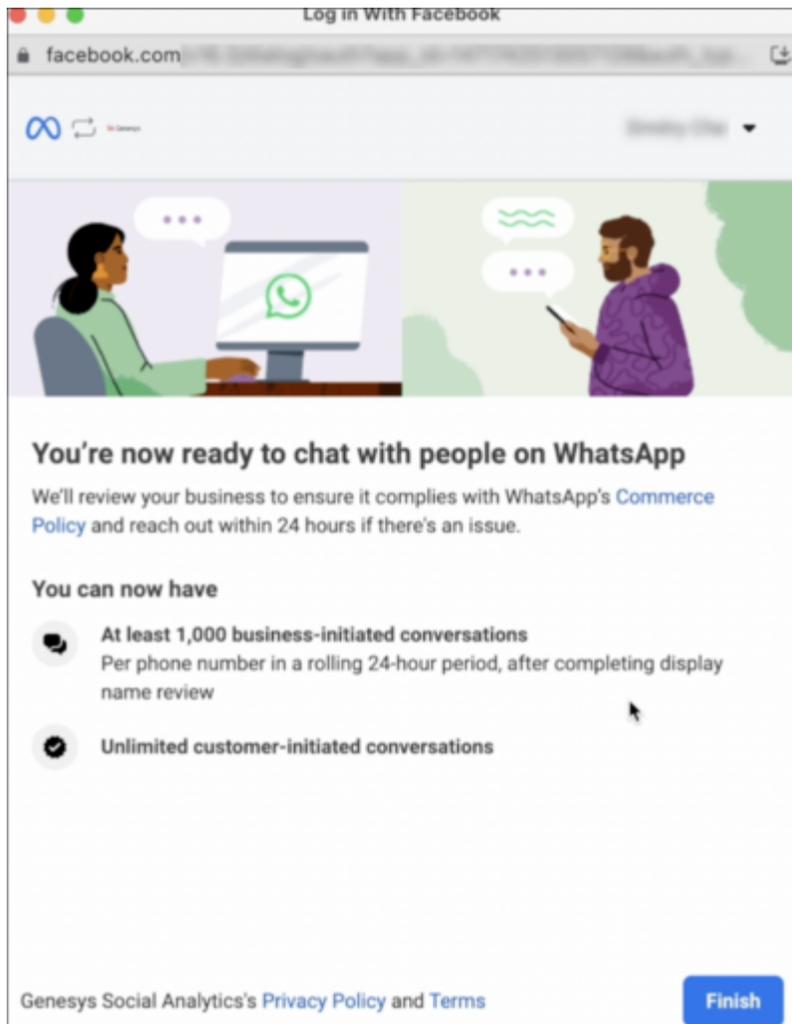
> **Important**
>
> After the WhatsApp phone number verification activates billing under the Genesys Engage credit line, any charges you incur through WhatsApp conversations and message template usage will begin to accrue immediately, and Genesys will invoice you quarterly for this.

6. Once the verification is complete, on the Genesys Hub page, select the WABA and Phone Number, and click on Register Phone Number to complete the process.
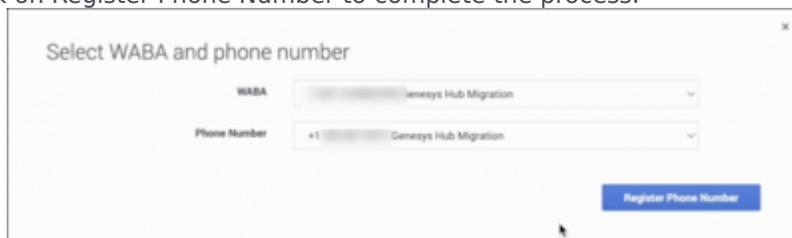
Migrate from Manual to Embedded Signup

1. In case of migrating from manual **on behalf of** signup to Embedded Signup, you are required to create a new WABA with a temporary phone number and follow the above mentioned steps from **Creating a New WABA** to **Verify Phone Number**.

2. Once the verification of temporary phone number is complete, select the new WABA and click on **Proceed to Phone Number Migration**.

3. To start migrating the already registered phone number, click on **Initiate Migration**.
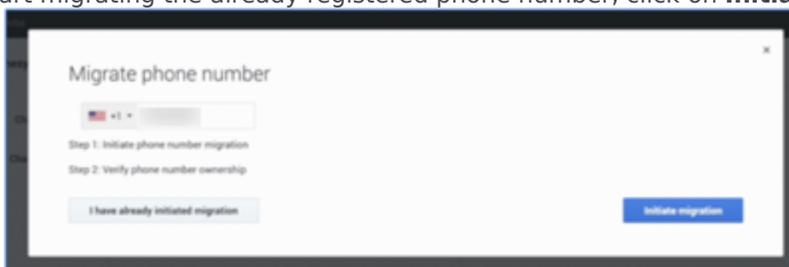
4. Activate the phone number using SMS or Voice Call, and click **Next**.
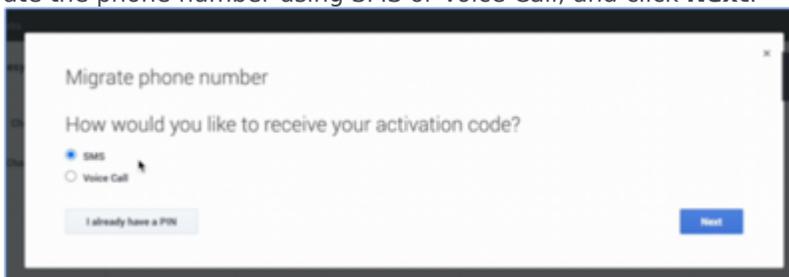
5. Enter the activation code and click **Submit**. You have successfully migrated your phone number using embedded signup.

6. Now log in to your WhatsApp Business Manager and delete the temporary number.

Template Migration

Templates that were created and approved within the previous Genesys-managed WABA will be copied to the new Embedded Signup-based WABA only when you migrate at least one phone number from the previous WABA to the new one.

> ### Important
>
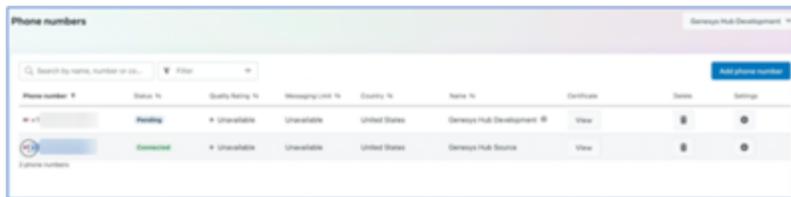> As the templates are copied from the old WABA to the new one, it's crucial to be aware that the namespace ID for all templates will change to the new one. It's important to integrate this updated namespace ID into your APIs to prevent any template-related errors.

Manage your WhatsApp Business Account (WABA)

You can view your WhatsApp Business Accounts in your Meta Business Manager when you complete the new WhatsApp onboarding using the Embedded Signup Flow. With Meta Business Manager, you can perform tasks, such as verify your business, update phone number or business profile, and maintain your message templates and QR codes.

Verify your business

When you verify your business, you ensure that your business is a legal entity, and that you are an approved representative of your business. For more information about how to verify your business, see https://www.facebook.com/business/help/2058515294227817 .

Update WhatsApp business/phone number profiles, Display name change

You can manage your WhatsApp phone numbers, display name and business profiles from your Meta business manager. To update your business profile for your phone number, perform the following steps:

1. Log in to Meta.

2. Select your business.

3. Navigate to **WhatsApp Manager** > **Account tools** > **Phone Numbers**

For more information about WhatsApp business phone numbers and display names, see:

- https://www.facebook.com/business/help/896873687365001 to check your WhatsApp Business phone number's quality rating

- https://www.facebook.com/business/help/378834799515077 to know more about WhatsApp Business display name

- https://www.facebook.com/business/help/378834799515077 to change your WhatsApp display name

- https://www.facebook.com/business/help/338047025165344 to learn about WhatsApp's display name best practices

Submit an Official Business Account (OBA) request

An Official Business Account (OBA) is distinguished by a green checkmark badge visible in its profile and chat thread headers. It's important to note that Genesys no longer handles the submission of WhatsApp OBA requests on your behalf. Instead, you can now directly submit these requests by accessing the Meta Business Manager.

For more information about how to submit requests, log in to your Meta Business Manager via https://business.facebook.com/ . You can also refer to:

- https://www.facebook.com/business/help/3273529806299830 to learn about Different Types of WhatsApp Business Accounts

- https://www.facebook.com/business/help/604726921052590 to request a WhatsApp Official Business Account

Manage message templates

With WhatsApp Embedded Signup, you can now create WhatsApp message templates in your Meta Business Manager directly. Genesys no longer accepts WhatsApp Template Message Request Forms for WABAs onboarded using the Embedded Signup Flow. To submit a template for approval with WhatsApp, perform the following steps:

1. Log in to your Meta Business Manager via https://business.facebook.com/ .

2. Select your business

3. Navigate to **WhatsApp Manager** > **Account tools** > **Message Templates**.

4. After you create and update your message templates in the WhatsApp Manager, WhatsApp have to approve them.

For more information about how to manage templates, see these articles in Meta's Business Help Center:

- https://www.facebook.com/business/help/2055875911147364?id=2129163877102343 to create message templates for your WhatsApp Business Account

- https://www.facebook.com/business/help/287011426725347 to edit Message Templates for Your WhatsApp Business Account

- https://www.facebook.com/business/help/2047376461998278 to delete message templates for your WhatsApp Business Account

- https://www.facebook.com/business/help/511126334359303 to view metrics for your WhatsApp Business message template

- https://www.facebook.com/business/help/766346674749731 to learn about your WhatsApp Business Message Template's Quality Rating

- https://developers.facebook.com/docs/whatsapp/updates-to-pricing/new-template-guidelines to read guidelines for Utility, Authentication, and Marketing templates

Important

Genesys Engage only supports WhatsApp templates in the Utility and Marketing categories and does not support Authentication type of templates yet. Genesys does not support "Flows" yet either.

Access your WhatsApp insights data

You can view real-time monitoring of messaging and spending analytics of your WhatsApp business account. You can also view the metrics of all conversations on the Insights tab of the WhatsApp Manager. The real-time graphs enable you to look into the performance of each metric.

For more information about how to view conversation insights for your WABA, see https://www.facebook.com/business/help/338500813332755 to view conversation insights for your WhatsApp Business Account.

Deploying Facebook Private Messaging

Genesys Social Engagement supports Facebook Private Messaging in which messages can be exchanged between a user and a Facebook page.

Prerequisites

- Management Framework (Configuration Layer)
- Universal Routing Server and Interaction Routing Designer
- Interaction Server
- Chat Server
- Digital Messaging Server, deployed with a Facebook channel. The value of inbound-route option must match the endpoint that you configure for Chat Server.

This procedure assumes that Chat Server is used for Facebook private messaging.

Procedures

Setting Options for Facebook Channel

Set **skip-private** to `false`. This indicates that private messages should be included into the fetch response of HUB fetch API call.

Configure Chat Server

1. Install Business Process for Use with Facebook.
2. Open Chat Server Application properties.
3. Go to the **Options** tab.
4. Create or open `endpoint:<you tenant ID>` section
5. Create a new key-value pair with name = FacebookInboundQueue and value = `Facebook Inbound Queue`
6. Open Business process in Interaction Routing Designer, navigate to Facebook BP, and connect **FacebookInboundQueue** of Chat Server with **Facebook Inbound Queue** of Facebook BP.
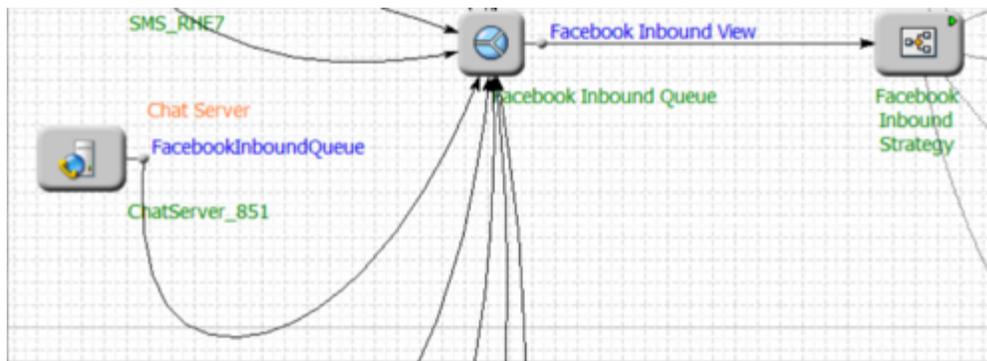
7. Save the changes and activate strategies from Facebook BP.

As an alternative, the default Chat Server business process can also be used.

Related articles

- Setting Up Social Engagement
- Deploy DMS with a Facebook Channel
- Genesys Configuration Options
    - Cloud API Driver for Facebook
    - Digital Messaging Server
    - Social Media Plug-in for use with Workspace Desktop Edition

Configure Multiple Facebook Channels

There are several possible combinations of Facebook channels.

One Account Channel, One Service Channel

1. Configure a Facebook Account channel.

2. Log in as an administrator and save the channel.

3. Configure a Service type channel and adds the pages and events you want to track. You must designate the Account channel as the default channel for the admin user (screenshot assign_default).

One Account Channel, Multiple Service Channels

This configuration is appropriate if the pages you want to track belong to the same administrator and you need to track each page on a separate service channel.

1. Configure a Facebook Account channel.

2. Configure a separate Service channel for each page. (see screenshots service1 and service2). As before, you must designate the Account channel as the default channel for the admin user.

Two or More Account Channels, Each With a Corresponding Service Channel

- Each cloud admin user must configure each pair of Account:Service channels.

- Each Account channel should be set as the default for the admin who configured it.

- For each Service channel, select the corresponding Account channel in the **Outbound channel** field.

This is very similar to configuring multiple Twitter channels. (screenshots multiple_channels1,2)

Social Media Plugin for Workspace Desktop Edition

Overview

Genesys provides a plugin that adds functionality to Workspace Desktop Edition, enabling agents to handle social media interactions.

Prerequisites

- Workspace Desktop Edition 8.5.1 or later.

Outline of Deployment

You can install the plugin for Workspace Desktop Edition using ClickOnce deployment or non-ClickOnce deployment procedure.

> ### Important
>
> - When installing Persistent Agent Chat for Facebook, a mandatory upgrade of the latest version of Workspace Desktop Edition (WDE), and Social Media Plug-in for Workspace Desktop Edition is required.
>
> - If you are using Digital Messaging Server, then a mandatory upgrade of the latest version of WDE, Social Media Plug-in for WDE, Genesys Cloud API Driver for Facebook, and Genesys Cloud API Driver for Twitter is required.
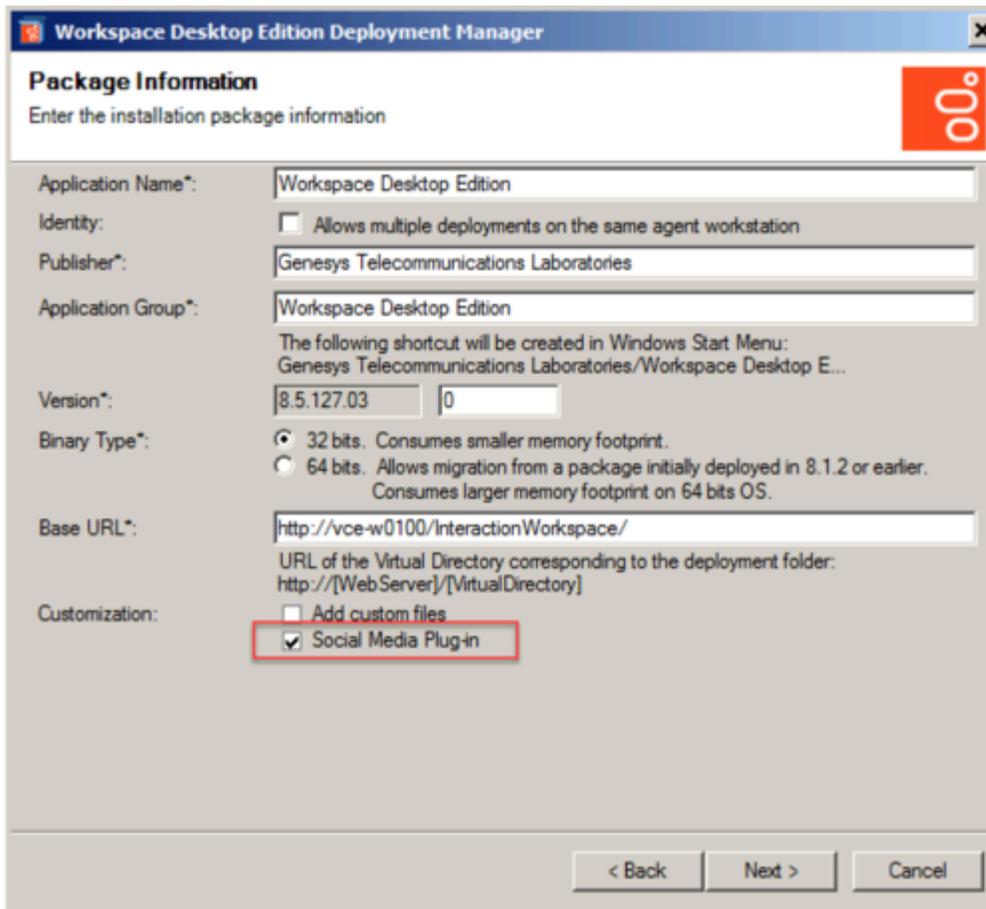
ClickOnce Deployment

Installation

1. Install WDE using the **Prepare a ClickOnce package** option. For detailed information on ClickOnce deployment of WDE, see WDE Deployment Procedures.

---
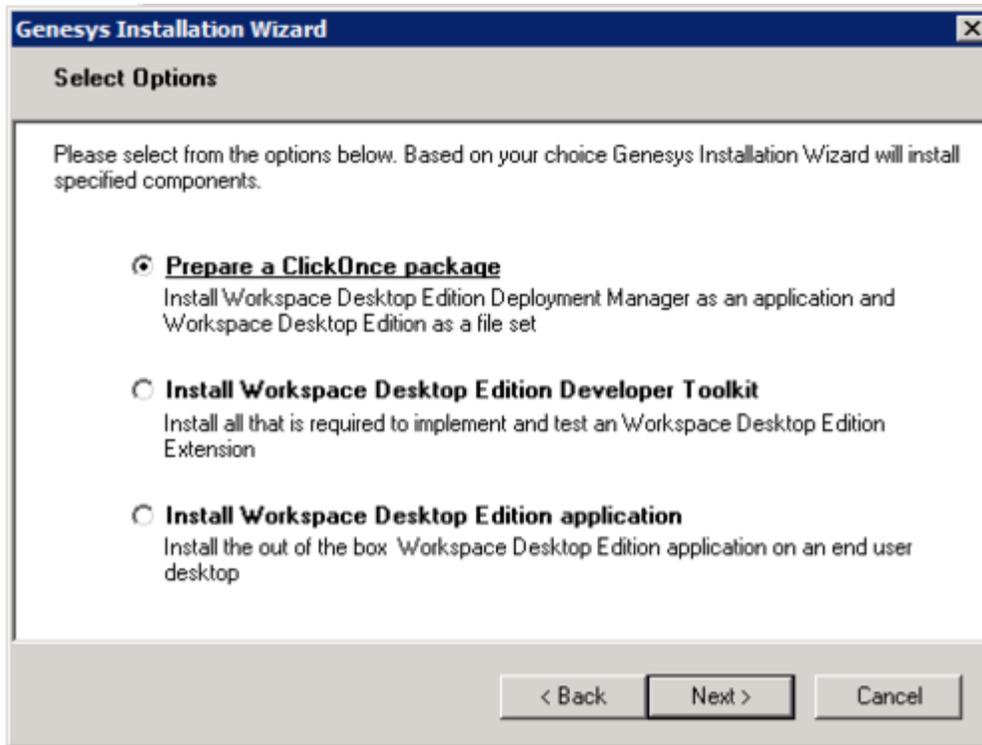
2. Install Social Media Plugin for Workspace Desktop Edition.

3. Select **Social Media Plug-in** when creating deployment package using Workspace Desktop Edition Deployment Manager.

4. Deploy Workspace Desktop Edition and Social Media Plugin for Workspace Desktop Edition via the published page.

Upgrade

1. Uninstall the existing Social Media Plugin for WDE.

2. Install the new plugin.

3. Select **Social Media Plug-in** when creating deployment package using Workspace Desktop Edition Deployment Manager.

4. Deploy Workspace Desktop Edition and Social Media Plugin for Workspace Desktop Edition via the published page.

Uninstall

1. Uninstall the existing Social Media Plugin for WDE.

2. Create deployment package using Workspace Desktop Edition Deployment Manager without selecting **Social Media Plug-in** .

3. Deploy Workspace Desktop Edition via the published page.

Non-ClickOnce Deployment

1. Configure Interaction Workspace. Note that to use role-based access control, you must use Genesys Administrator to configure Workspace Desktop Edition and the plugin.

2. Install Interaction Workspace using the non-ClickOnce deployment procedure, also known as "installing the Interaction Workspace Application."

3. Configure and install the social media plugin, being sure that your configuration procedure includes importing the template and metadata for the plugin (see Genesys Administrator 8.1 Help for information on importing metadata). This makes roles and other required items available.

4. Assign privileges, if you are using role-based access control.

   - You must assign all Workitem privileges. The plugin does not support unassigned Workitem privileges.

   - Assign <socialmedia> privileges.

5. Provide values for the configuration options that you added to your Interaction Workspace Application, as described in the next section of this page.

Configuration Options

Refer to the interaction-workspace section to learn about the configuration options for the Social Media plugin in detail. This section provides an outline of the options. Click the option for the description in the pop-up.

Queue Options (mandatory)

You must set a value for these options.

- facebook.default-queue
- twitter.default-queue
- facebook.outbound-queue
- twitter.outbound-queue

Regex Options

These options allow for certain strings to be highlighted and made clickable when interactions are displayed.

- facebook.url-regex
- twitter.url-regex
- facebook.hashtag-regex
- twitter.hashtag-regex
- twitter.mention-regex

Color Options

These options allow messages to be displayed in different colors in the Facebook Session view using Hexadecimal color codes.

- facebooksession.background-color-agent

- facebooksession.background-color-client

- facebooksession.background-color-error

- facebooksession.background-color-external

Workbin Options

- workbin.facebook.draft

- workbin.twitter.draft

Media Filters in WDE

- contact.history.media-filters

Important

To support filtering of all types of Facebook and Twitter interactions in WDE, add the values `facebook`, `facebooksession`, `facebookprivatemessage`, `twitter`, and `twitterdirect` to the above option.

Emoji Picker

Enabling Emoji Picker

Tip

For more information about emojis in Genesys solutions, see this article.

Social Media Plugin for Workspace Desktop Edition uses the following configuration options to display emojis in inbound interactions and in emoji picker:

- `facebook.font-name`

- `twitter.font-name`

To connect the emoji picker for Facebook and Twitter we have to add in WDE configuration settings in existing `interaction-workspace` section keys:

- `facebook.emojis-business-attribute`

- `twitter.emojis-business-attribute`

Set the value of the these attributes options to the name of a Business Attribute that defines the emojis that you want to support. It can be one common attribute, for example "Emojis", per both facebook and twitter mediatypes or different like for example "FacebookEmojis" and "TwitterEmojis".

Valid Values: The name of a Business Attribute that defines a set of emojis.
**Changes take effect:** At the next interaction.

Use the following steps to create a Business Attribute that defines the emojis that your agent can send:

1. Create a new **Business Attribute** with a name (for example "Emojis"). This is the Business Attribute that you set as the value of the `chat.emojis-business-attribute` option.

2. In the **Attribute Value** tab of the **Business Attribute**, create one value for each emoji Unicode character that you want to support.

3. Name each value with a unique name, such as the number of the Unicode character that you want to support. The Display Name that you define is displayed in a tooltip when an agent hovers their mouse pointer over an emoji before selecting it from the chat text field tools.

4. For each attribute value, configure the code option and assign to it the value of the emoji Unicode character. The value of the Unicode emoji format is 1F6nn where nn are digits in hex format; for example: 1F607

The following procedure explains how to set up a sample laughing face emoji that has a Unicode = 1F610:

1. Under the *Emojis* business attribute, create a new Business Attribute Value.

2. Update the fields in the **General** tab with relevant information.

3. Create a new section called `interaction-workspace` in the **Annex** tab.

4. In the `interaction-workspace` section, create a new option with **Option Name** = code, and **Option Value** = 1F610
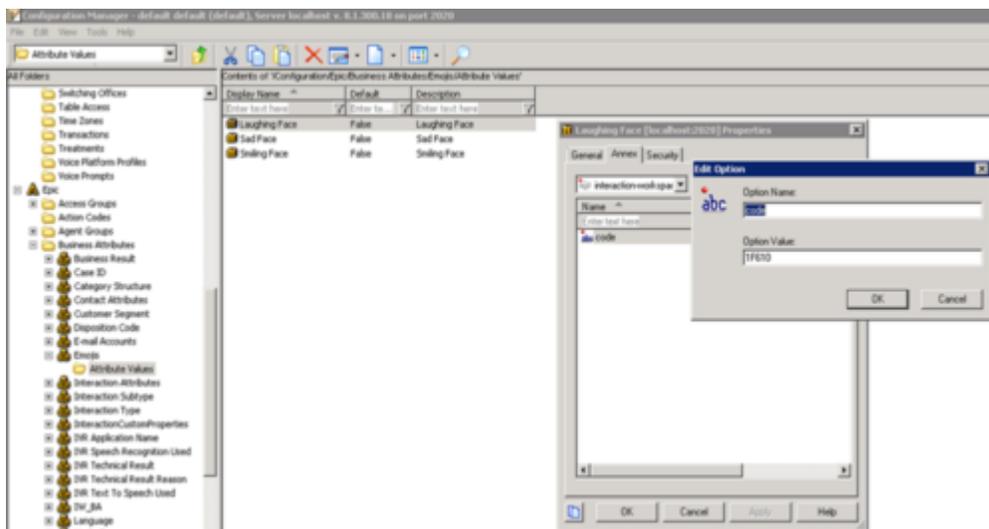
5. Save this Business Attribute Value. This configured emoji will appear in Emoji Picker now.
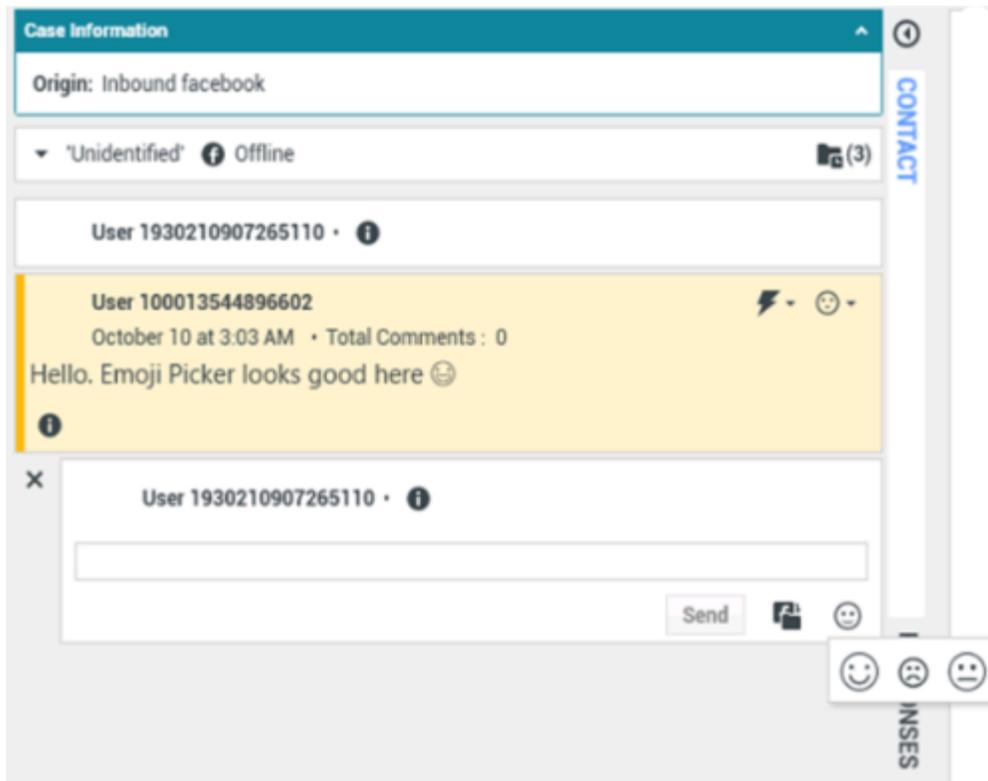
Enabling Emojis in WDE

Twitter and Facebook interactions support Unicode 6 emojis from an installed font such as Segoe UI Emoji. To enable emojis, you must:

1. Add the following parameters to the Digital Messaging Server init file **JavaServerStarter.ini** under the [JavaArgs] section:
    -Dfile.encoding=UTF-8

    -Dfile.client.encoding=UTF-8

    -Dclient.encoding.override=UTF-8

> ### Important
> To avoid data corruption, you must ensure that all components in the chain of communication use UTF-8 encoding.

2. Install the font Segoe UI Emoji from https://www.dafontfree.net/freefonts-segoe-ui-emoji-f63785.htm.

3. Set the font name and font size for Twitter inbound interaction text and the font name for Twitter outbound interaction text by adding these options to the WDE configuration settings under the "interaction-workspace" section:
    twitter.font-name="Segoe UI Emoji"

```
twitter.font-size=[specify font size if you need to change the default of 14]
```

4. Set the font name and font size for Facebook inbound interaction text and font name for Facebook outbound interaction text by adding these options to the WDE configuration settings under the `interaction-workspace` section:

```
facebook.font-name="Segoe UI Emoji"

facebook.font-size=[specify font size if you need to change the default of 14]
```

The related map between emoticons and emojis is defined in the file **EmoticonsEmojis.xml**, where you can add, update, or remove emoticon-emoji pairs. After editing this file, you must restart WDE.

Installing codecs for video and audio attachments

1. Install the latest K-Lite codec pack using the link: https://codecguide.com/download_kl.htm .

2. Install the latest QuickTime from Apple using the link: https://support.apple.com/downloads/quicktime .

3. Ensure that you have Windows Media Player installed. Otherwise, install it using the link: https://support.microsoft.com/en-us/help/14209/get-windows-media-player .

4. If you are on a Windows Server edition, turn on Desktop Experience.

5. Reboot your OS.

Legal Terms for Social Engagement 9.0.0

Overview

IMPORTANT - THIS DOCUMENT MUST BE READ IN FULL AND TERMS ACCEPTED PRIOR TO THE DEPLOYMENT OR UPGRADE OF GENESYS SOCIAL ENGAGEMENT

The release of Genesys Social Engagement version 9.0.0 ("Product") introduces some *significant changes* over earlier versions of the product.

Prior to deploying (or upgrading) and using the Product (and subsequent versions) you agree to review the remainder of this document, after which you will select the **click-to-accept** option to be bound by these Terms. If you do not agree to these Terms, in whole or in part, you will reject the Terms and refrain from deploying or otherwise using the product. If you are deploying (or upgrading) the product on behalf of an organization or entity ("Customer"), then you are agreeing to these Terms on behalf of that Customer and you represent and warrant that you have the authority to bind the Customer to these Terms. In that case, "you" and "your" refers to you and that Customer.

Social Engagement Channels

Channels in the Product are used to source and dispatch data to and from Twitter and Facebook and potentially other Social Networks ("Social Media Providers"). You, or authorized persons working with the Customer may setup channels for the purposes of enabling engagement around Customer's business on Social Media. Customers will not setup channels for the purpose of monitoring competitors branded social networking pages or for uses outside of the need to engage and manage conversations regarding their business on Social Media.

The Customer's usage of Social Media will be bound by the Social Media Providers: Rules, and Terms of Service, that may be found on Social Media Providers branded web pages. Notwithstanding any term in the Agreement to the contrary, Genesys reserves the right to suspend the Product, or portion thereof, or reject or cancel the transmission of any information through the Product based upon (i) reasonable belief that the use of the Product is in violation of applicable laws or Social Media Providers Terms of Service (ii) Customer's use unreasonably burdening the platform running the Product (e.g., use of broad search criteria) or (iii) an imminent compromise to the security or integrity of the platform running the Product. As practicable depending on the circumstances, Genesys will provide written notice of the suspension and keep Customer reasonably informed of Genesys' efforts to restore the Customer's use of the Product.

Customer Interactions Stored in the Genesys Data Center

In order to facilitate the use of the analytics component of the Product, Genesys will store a copy of the customer's inbound and outbound Twitter and Facebook posts, comments, and messages ("Customer Interactions") in a Genesys-managed software-as-a-service environment/data center, for

a maximum of 4 months, after which the data will be deleted from the Genesys-managed software-as-a-service environment/data center. Customer will not use the Product to receive or transmit sensitive data, including but not limited to personal health information, personally identifiable information, passwords and sensitive account access information, and credit card information. Provided that Customer is fully compliant with the limitations in this Agreement, Genesys shall maintain reasonable, appropriate administrative, physical, and technical safeguards for protection of the security, confidentiality and integrity of Customer Interactions while such interactions are stored with the Genesys-managed software-as-a-service environment/data center center

As between Genesys and Customer, the Customer Interactions are the proprietary material of Customer and shall be considered Customer's Confidential Information. Customer grants Genesys a non-exclusive, non-sublicenseable (except to parties working on Genesys' behalf), non-transferable, royalty-free license to access, process, store, transmit, and otherwise make use of the Customer Interactions as directed by Customer or as necessary to provide the Product capabilities and to otherwise fulfill its obligations under and in accordance with the Agreement.

Data Limits

Genesys does not limit the number of inbound Customer Interactions, but limits imposed by 3rd parties such as Twitter and Facebook apply to inbound Customer Interactions and thus may impact the availability and throughput of such inbound Customer Interactions. Inbound Customer Interactions may include tweets that mention the company's handle or tweets that mention keywords, or Twitter Direct Messages, or any posts or comments around the customer's Facebook page or events, or Facebook Private Messages via Facebook or Facebook Messenger.

Genesys does not limit the number of outbound Customer Interactions that are issued in direct response to inbound Customer Interactions.

Service Availability Support and Warranties

Service level targets as set out in the Support Guide for On-Premises Licenses shall come into effect following acknowledged receipt of All Relevant Information being supplied by Customer to Genesys for the Product.

Maintenance must be purchased with new and continued use of the Product. The analytics component of the Product is facilitated by the Genesys-managed software-as-a-service environment/data center. Use of analytics component of the Product is only available for those customers that purchase and continuously maintain Maintenance. Lapse in maintenance coverage terminates any usage right of the analytics component of the Product.

Customers that discontinue Maintenance, may build custom interfaces to Social Media Providers, and continue to use the engagement capabilities of the Product.

Customer acknowledges that the Product is dependent on access to various third party services (including (but not limited to) Twitter and Facebook) and you agree that Genesys is not responsible for the non-availability, delays, failures or interruption affecting the Service or the performance of the Service caused by any such third party services or errors or bugs in software, hardware or the

Internet on which the Service relies as you acknowledge that we do not control such third party services and such errors or bugs are inherent in the use of such software, hardware and the Internet.

Disclaimer

THE PRODUCT AND SERVICES ARE PROVIDED ON AN "AS IS" "WHERE IS" AND "AS AVAILABLE" BASIS WITHOUT WARRANTY OF ANY KIND EITHER EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO THE IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, AND NON-INFRINGEMENT. GENESYS MAKES NO REPRESENTATIONS OR WARRANTIES THAT USE OF THE SOCIAL ENGAGEMENT SERVICES WILL BE UNINTERRUPTED, TIMELY, COMPLETE, OR ERROR-FREE.

Do you accept these terms?

ACCEPT