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# WeChat Guide

Messaging Applications 9.0.0

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# WeChat

This document describes how to deploy and use the Genesys driver and plugin for WeChat.

- [Deploying the WeChat Driver](#)
- [Sample Business Process for WeChat](#)
- [Using the WeChat Plugin for Workspace Desktop Edition](#)

# Deploying the WeChat Driver

## Prerequisites

- A computer with:
  - Public IP/URL and port 80 (HTTP) accessible from the Internet (for inbound messages sent by WeChat).
  - Port 443 (HTTPS) opened (for outbound messages sent to WeChat).
  - JRE or JDK version 8 or above with "Unlimited Strength Java Cryptography Extension Policy" files installed (see <http://www.oracle.com/technetwork/java/javase/downloads/jce8-download-2133166.html>).
  - Supported platforms are Windows Server 2012 (x64) and Linux 7 (x64).
- Genesys components:
  - Chat Server version 8.5.109.06 or later
  - Workspace Desktop Edition 8.5.117.18 or later
- A WeChat account of the Verified Service type. Some directions on doing this are available [here](#).

## Deploy Digital Messaging Server

Follow the [installation procedure for Digital Messaging server](#).

## Install the Channel Driver

Run the installation for Genesys Driver for Use with WeChat, selecting the desired Digital Messaging Server object.

## Configuring the Channel

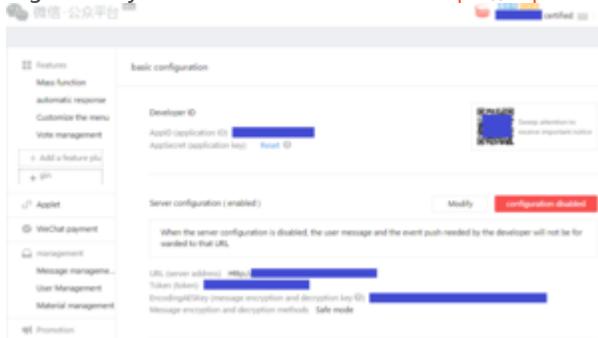
All options are documented in the [Options Reference](#).

## Driver Options

The Genesys Options Reference provides documentation of all options for **Digital Messaging Server**, including the options provided by the **WeChat Driver**.

Before setting options you must record some information associated with your WeChat account:

1. Sign in to your WeChat account at <https://mp.weixin.qq.com>. See the following figure.



WeChat Account Basic Configuration Page

2. The resulting page presents a QR code; scan it with a smartphone.
3. On the resulting **basic configuration** page, make a note of the following:
  - Application ID
  - Application Secret
  - Public IP/URL
  - Access Token
  - AES Key (Cryptography key)

Then set or review the following options:

- x-debug-mode—Required value: false
- driver-classname—Required value: com.genesyslab.mcr.smsserver.channel.wechat.WeChatDriver
- inbound-route—Example: ,1:wechat\_session
- reconnection-timeout—Required value: 60
- ucs-in-use—Required value: true
- x-acc-token—(Access Token value from your WeChat account)
- x-aes-key—(AES Key from your WeChat account)
- x-app-id—(Application ID value from your WeChat account)
- x-app-secret—(Application Secret value from your WeChat account)
- x-media-type-chat—Required value: wechatssession
- x-media-subtype-chat—No value

## Chat Server

You must use a separate Chat Server for WeChat messages. Set the following Chat Server options:

- stop-abandoned-interaction = never
- transcript-auto-save = 1 or 2.

Ensure that the following Chat Server options are set to their default values:

- use-contact-server = true
- session-restoration-mode = none

Review the Interaction Server handling-timeout option. Genesys recommends that you set this to a higher level than its default setting of 180; to 600, for example. This helps the system handle scenarios in which the WeChat session goes offline and the agent cannot reply to the customer.

There is a limit on the concurrent chat sessions Chat Server can support at a time. It depends on the hardware and chat session scenario, but as a rule of thumb you can expect a maximum of 1,000 concurrent sessions on one Chat Server.

## Other Configuration

- **Create media types** in the Configuration Server database:
  - Type **wechat**
  - Subtype **wechat**
- Configure role permissions.

## Deploy WeChat Plug-in for Workspace Desktop Edition

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" (the WeChat plugin does not support ClickOnce deployment).
3. **Configure and install** the 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. If you are using role-based access control,
  - You must assign all Workitem privileges. The plugin does not support unassigned Workitem privileges.
  - Assign InteractionWorkspace.WeChat.canUse privileges. This allows agents to load the WeChat plugin. If this permission is not set, the plugin will not load.

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

## Configuring the Plugin

### Plugin Options

All options for the WeChat plugin are located in the **[interaction-workspace]** section. Options are documented in the [WeChat Plug-in for Workspace Desktop Edition](#) section of the eServices Options Reference.

### Workspace Desktop Edition Options

Workspace Desktop Edition options are documented in the [Configuration Options Reference](#) section of the Workspace Desktop Edition Deployment Guide. The following settings are recommended:

- **contact.directory-displayed-columns** = LastName,FirstName,PhoneNumber,EmailAddress, \_msg\_ProfileNickname,\_msg\_ProfileUserId\_WeChat
- **contact.directory-search-attributes** = LastName,FirstName,PhoneNumber,EmailAddress, \_msg\_ProfileNickname,\_msg\_ProfileUserId\_WeChat
- **contact.displayed-attributes** = Title,FirstName,LastName,PhoneNumber,EmailAddress, \_msg\_ProfileNickname,\_msg\_ProfileUserId\_WeChat
- **display-format.case-name-format** = \$Contact.\_msg\_ProfileNickname|\$Contact.FirstName\$ \$Contact.LastName|\$Interaction.MainParty\$
- **display-format.customer-name-format** = \$Contact.\_msg\_ProfileNickname|\$Contact.FirstName\$ \$Contact.LastName|\$Party.DisplayName\$
- **interaction.window-title** = (\$Contact.FirstName\$ \$Contact.LastName\$ \$Interaction.\_msg\_ProfileNickname|\$Interaction.MainParty\$) - \$Interaction.Type\$ - \$Window.Title\$
- **toast.window-title** = (\$Contact.\_msg\_ProfileNickname|\$Contact.FirstName\$ \$Contact.LastName|\$Interaction.MainParty\$) - \$Window.Title\$

### Important

The plugin supports only the Default theme. If any other theme is specified, the plugin icons will be missing.

# Sample Business Processes for WeChat

## Important

Although the sample Business Process is provided in installation packages (IPs) for both Linux and Windows, installing it makes use of Interaction Routing Designer (IRD), which is available on Windows only.

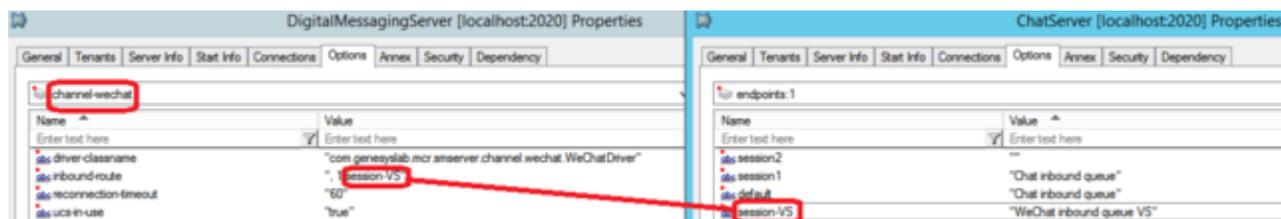
## Configuration

Configure the following:

### Endpoints

- Chat Server: in the **[endpoints]** section, add a queue called **WeChat inbound queue VS**.
- Digital Messaging Server: in the **[channel-\*any name\*]** section for your WeChat channel, add an endpoint called **session-VS**.

See the figure (click to expand):



Endpoint Configuration

### Contact Attributes

- In Genesys Administrator or Configuration Manager, create the following Business Attributes of the Contact Attribute type:
  - **\_msg\_ProfileUserId\_WeChat**, with these options in its **[settings]** section (**Annex** tab):
    - **is-searchable** = true
    - **is-sortable** = true
    - **search-order-level** = 1
  - **\_msg\_ProfileNickname**, with these options in its **[settings]** section (**Annex** tab):
    - **is-searchable** = false

- **is-sortable** = false

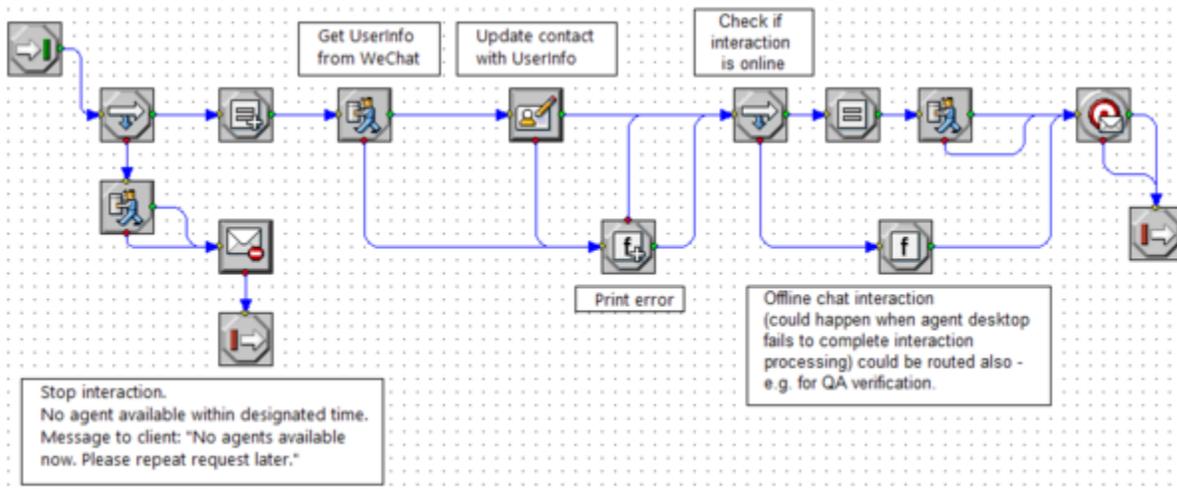
## Installing

This sample Business Process is delivered as part of the installation of the Genesys Driver for use with WeChat. After installing the driver:

1. Launch IRD. In the main window, click **Interaction Design**, then **Business Processes**.
2. Double-click any existing Business Process to open the **Interaction Design** window. From the **File** menu, select **Import**.
3. Browse to the folder <Digital Messaging Server application name>\media-channel-drivers\channel-wechat and select **ABC\_Simple\_WeChat\_BP.wie**.
4. Still in IRD, create a queue called **WeChat inbound queue VS** and connect it to Chat Server.
5. Activate the new Business Process strategies: Right-click **ABC\_Simple\_WeChat\_BP** and select **Activate Strategies**.
6. Verify that all strategy objects are associated with the correct Application objects.

## Sample Business Process for WeChat

The sample Business Process contains the single strategy **WeChat inbound strategy**, shown below (click to enlarge):



WeChat inbound strategy

The strategy proceeds as follows.

1. Check how long the interaction has been waiting for the agent. If it's more than 150 seconds, terminate the interaction with a message to the customer to try later.

2. Initialize a variable from the user data key: `_msg_ProfileUserId_ABC`.
3. Send an additional request to get more User profile data from WeChat (**Get UserInfo from WeChat**).
4. Use the resulting data to update the attributes of the identified contact in UCS.
5. Check whether the interaction is online; if it is, notify the customer with the message “An agent will be with you shortly ....”.
6. Deliver the interaction to an available agent in the agent group **Chat distribution for processing**.

# Using the WeChat Plugin for Workspace Desktop Edition

This section describes using Interaction Workspace Desktop Edition to receive and handle interactions coming from the WeChat channel of Genesys Messaging Apps.

## Receiving and Handling an Inbound WeChat Interaction

If you are the selected internal target of an inbound WeChat interaction, you receive a notice on your workstation desktop. You can decide to accept or reject the interaction. If you accept it, the WeChat Interaction window is displayed. The WeChat Interaction window contains information about the interaction and the controls that you need to complete the interaction.

### Lesson: Handling an inbound WeChat interaction

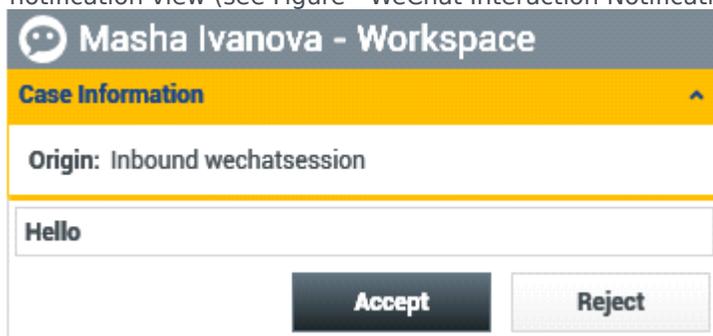
**Purpose:** To handle an inbound WeChat interaction properly.

#### Prerequisites

- You are logged in to Workspace (see [Lesson: Logging in to Workspace](#)).
- Your status is Ready for the WeChat media channel (see [Lesson: Going Ready in the Workspace Main window](#)).
- You are the internal target of the inbound interaction.

#### Start

1. A preview of the inbound interaction is displayed on your workstation desktop in an interactive-notification view (see Figure—WeChat Interaction Notification).



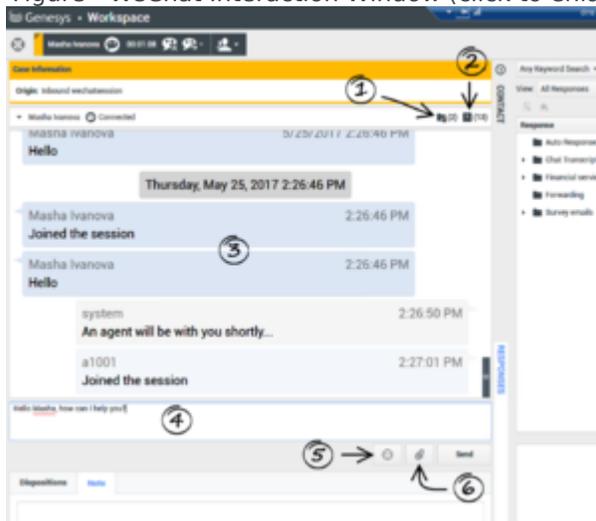
WeChat Interaction Notification

The Interaction Preview contains a summary of information that pertains to the interaction, including contact information and type of interaction. The Interaction Preview might also contain Case Information, which is part of the case data about the interaction.

2. You can choose to accept or reject the interaction in the Interaction Preview by performing one of the

following steps:

- Click Accept to display the interaction.
  - Click Reject to return the interaction to the queue.
  - Do nothing. The interaction will time out and be redirected.
3. If you accept the interaction, the inbound WeChat Interaction window is displayed, as shown in the Figure—WeChat Interaction Window (click to enlarge).



WeChat Interaction Window

Legend:

1. Interactions in progress
  2. Recent interactions
  3. Transcript area
  4. Message area
  5. Emoji selector
  6. Attachment button
4. To reply to the message, just enter text in the message area. You can copy and paste selected text.

**End**

## Warning

The WeChat service responds with an error message in the following situations:

- The "Official account" (agent) sends the WeChat client too many messages (the limit is about 20) while the WeChat client is inactive.
- The "Official account" (agent) sends the WeChat client multiple messages within a very short time interval.

- The "Official account" (agent) sends the WeChat client text messages with more than 3000 characters.

### Next Steps

- You may wish to use some of the the features in described in WeChat Functionality and Workspace Functionality below. When you are finished, click Done to stop the current interaction. The information is saved in the contact history and the WeChat Interaction window is closed. You can also [set a disposition code](#).

## WeChat Functionality

### Attachments

Click the paperclip icon (6 in the figure **WeChat Interaction Window**) to attach a file. You can also receive attachments.

- Click the corresponding icon in the transcript area to display or play the attachment.
- Right-click the icon and select **Save as...** to save the attachment.

#### Tip

The size and type of file that you can attach or receive may be limited by your configuration.

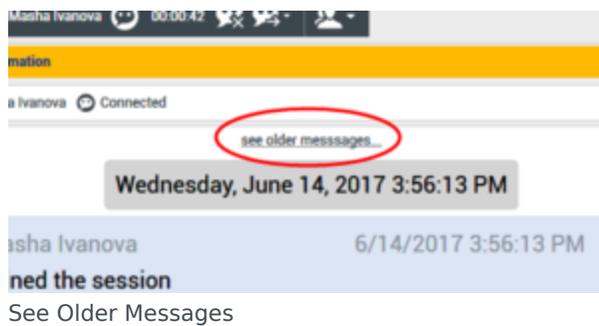
### Emojis

WeChat provides a basic set of emojis (technically these are *stickers*). Click the smiley-face icon (5 in the figure **WeChat Interaction Window**) to get a selection window. When you select an emoji, it appears in the message area as a bracketed expression (for example, [grimace]), but once you click **Send** (or type Enter), the emoji appears in the transcript area in its full form. The bracketed expression also appears when you mouse-over the emoji.

The language of the bracketed expression is determined by the setting of the `wechat.session.emoji-selector-mode` option.

### Previous Messages

Click **see older messages...** (shown in the figure) to see previous messages from the current contact.



## Workspace Functionality

While you are interacting with your WeChat contact, you can use the general Workspace functionality in the WeChat Interaction window.

### Important

Some of the procedures and tasks below are media-specific, but you can apply the information when working with WeChat interactions.

- Use the Note to attach a note to the interaction history. See [Managing Contact History](#).
- View Case Information for the current interaction.
- View and manage contact history. See [Managing Contact History](#)
- View and manage contact information. See [Lesson: Finding and viewing an interaction in the contact database](#).
- Your account might be configured to let you assign an interaction with an unknown contact to a known contact in the contact database by using the [Manual Contact Assignment](#) feature.
- Use the Standard Response Library for pre-written text for replies and comments. Click the vertical **Responses** button, as shown in the [Using The Standard Response Library](#) lesson.
- Cross over into another media channel. If, as an agent, you learn other contact information, such as a contact's phone number or email address, you can manually enter this information on the **Information** tab. The corresponding choice for other media channels is then displayed when you click the **Party Action** menu that is next to the name of the contact. You can then reply by using a voice call, an email, an SMS message, or any other supported media channel for a WeChat contact. Workspace displays a drop-down list of available channels to access a contact.
- If you want to transfer the interaction to another internal target or consult with another internal target about the interaction, you can perform the following functions:
  - Instant-transfer the interaction to another internal target. See [Lesson: Starting an instant SMS transfer](#), which is similar to the WeChat procedure.
  - Start a consultation with another party:
  - Start an Instant Messaging consultation. See [Lesson: Initiating an Instant Messaging session](#).

- Start a Voice consultation. See [Starting a Voice Consultation](#).