



PureConnect®

2018 R5

Generated:

12-November-2018

Content last updated:

12-December-2018

See [Change Log](#) for summary of changes.



PureConnect Social Media

Technical Reference

Abstract

This document is a reference to configure social media features in PureConnect.

For the latest version of this document, see the PureConnect Documentation Library at: <http://help.genesys.com/cic>.

For copyright and trademark information, see https://help.genesys.com/cic/desktop/copyright_and_trademark_information.htm.

Table of Contents

| | |
|---------------------------------------------------------------|----|
| Table of Contents | 2 |
| Social Media in PureConnect | 3 |
| How Social Media Processing Works | 4 |
| Facebook Example | 4 |
| Twitter Example | 4 |
| Social Media Components | 5 |
| Social Media Related Applications | 6 |
| ACD Routing of Social Media Interactions | 7 |
| Social Media Interactions in Interaction Connect | 8 |
| Social Media Configuration | 9 |
| Licensing | 9 |
| User and Workgroup Configuration in Interaction Administrator | 9 |
| Station Configuration | 11 |
| Channel Configuration | 11 |
| Poll Interval and Post Limit | 12 |
| CIC Server | 13 |
| Toolsteps and Initiators | 14 |
| Change log | 15 |

Social Media in PureConnect

The PureConnect social media features introduced in Interaction Connect in 2018 R4 allow your call center agents to receive and reply to inbound Facebook and Twitter messages, Facebook private messages, and Twitter direct messages.

PureConnect also contains features for social media recordings and analytics.

How Social Media Processing Works

As an administrator, you create one or more *channels* for Facebook and Twitter.

- A Facebook channel associates a CIC workgroup with a Facebook page.
- A Twitter channel associates a CIC workgroup with a set of keywords and Twitter handles.

PureConnect pulls messages from Twitter and Facebook and passes them to the CIC server for processing as interactions. Each interaction is routed to the workgroup that is associated with the channel that pulled in the message.

Facebook Example

An organization wants to manage messages that customers post on its corporate Facebook page. They create a channel that associates that Facebook page with a CIC ACD workgroup. Any messages posted to the page become interactions that are routed to the workgroup.

The company might also have regional or location-based Facebook pages, for example, and can associate those pages with workgroups.

PureConnect processes Facebook social conversations as follows:

1. A Facebook page visitor posts a message on the company's Facebook page.
2. The message becomes a social conversation interaction and ACD routes it to an agent.
3. The agent receives and picks up the interaction in Interaction Connect, just as they receive and pick up other types of interactions. The agent can also place the interaction on hold and can disconnect it when the conversation ends.
4. The agent replies to the interaction.
5. The social media processor updates the interaction with any replies and the replies appear as comments on the company's Facebook page.
6. The Facebook page visitor replies to the comment or adds another comment, and then the social media processor adds the reply to the conversation and notifies the agent.

Twitter Example

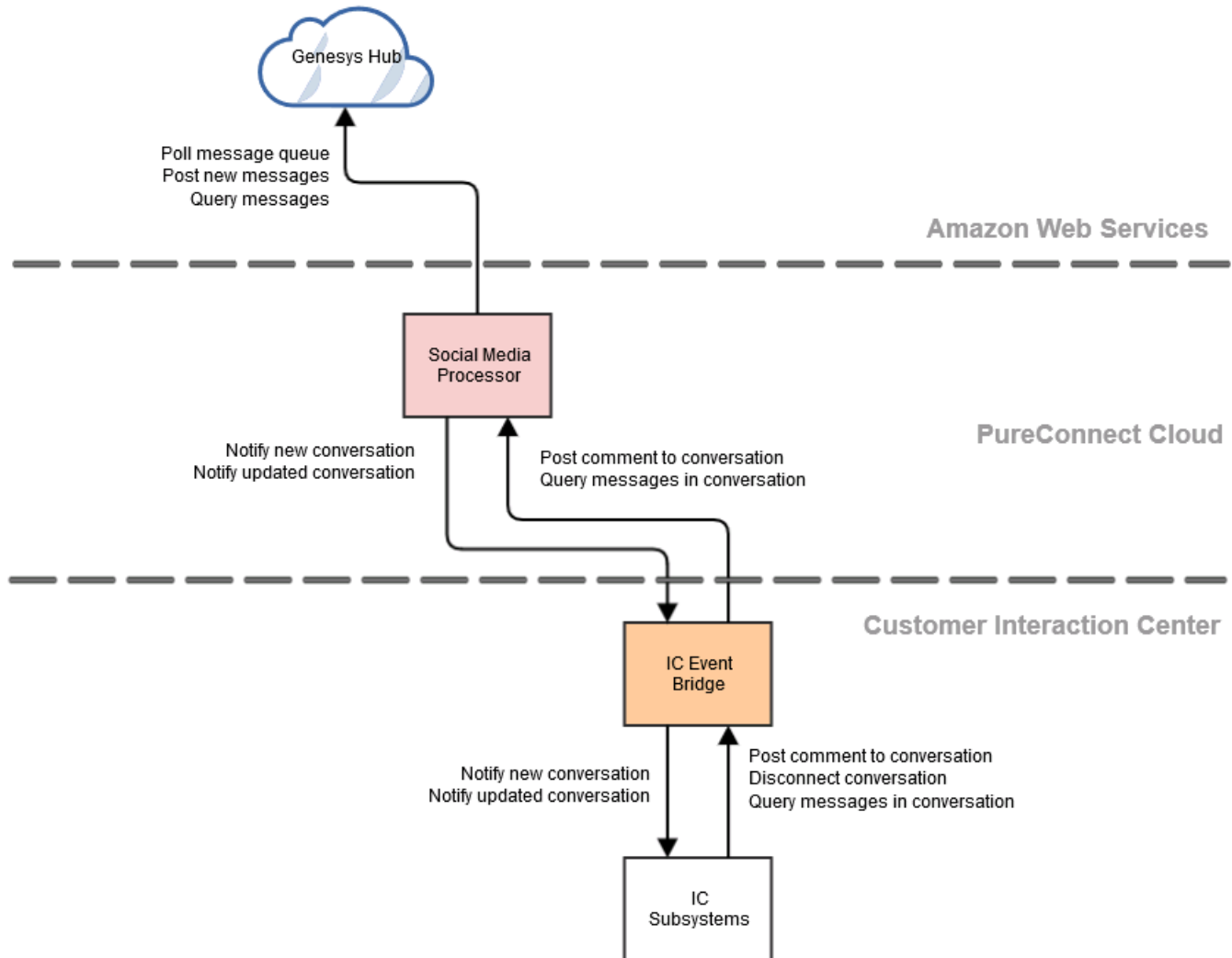
A company wants to manage Twitter messages that mention its name. They create a channel that associates their Twitter handle (@companyname) with a workgroup. Any tweet that mentions their handle becomes a social conversation interaction that is routed to the workgroup. They also associate keywords with a channel so that all tweets that include those keywords also become interactions.

The company also wants to track messages that mention a competitor and their competitor's product. They associate the competitor's handle with a channel and add the competitor's product name as a keyword.

Social Media Components

The social media feature includes these components:

- The **Social Media Processor** processes and caches data for Customer Interaction Center.
- The **Genesys Hub** provides a platform-agnostic API for the social platforms that Genesys products support.
- The **CIC server** includes subsystems that work with the social media processor to process social media interactions for CIC. It also includes the **IC Event Bridge**, which connects to the social media processor and creates social interactions for social media data.



Social Media Related Applications

| Application | Description | For more information |
|-----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------|
| Interaction Connect | Allows agents to receive and respond to social media interactions. Agents can pick up, hold, and disconnect social media interactions. Interaction Connect also provides agents with access to their quality management scorecards and interaction recordings for social media interactions. | Interaction Connect help |
| Interaction Tracker | Allows administrators and supervisors to search for social media interactions and view the details in the Interaction Details view. | Interaction Desktop help (Interaction Tracker?) |
| Interaction Recorder | Allows supervisors to search for and play back recordings for social media interactions. For example, when creating a search in Interaction Recorder Client in IC Business Manager, a supervisor can add a search attribute to find recordings for Twitter by searching for Media Specific > Social > Platform and selecting Twitter. | Interaction Recorder help |
| Interaction Recorder Policy Editor | Allows supervisors to create initiation, retention, and security policies for recording social media conversations. | Interaction Recorder Policy Editor help |
| Interaction Designer | Includes a new social conversation exit path for the Query Media Type toolstep for determining interaction types. There is a new initiator for transferring social media interactions | Interaction Designer help |
| Interaction Supervisor in IC Business Manager | Includes statistics for the longest social conversation and active social conversations and includes the social conversation media type in the search criteria in the Interaction Details view. The Interaction Details dialog includes a media type indicator for social conversations. | Interaction Supervisor help |

Note: Social media interactions are not routed through Interaction Director.

ACD Routing of Social Media Interactions

Automatic Communication Distribution (ACD) of social media interactions, as with other types of interactions, routes incoming messages to agents. For general information about ACD, see the *ACD Processing Technical Reference*.

The social media interaction types are Social Conversation for public Facebook and Twitter messages, and Social Direct Message for Facebook private messages and Twitter direct messages.

Agents must have the ACD Social Media option enabled in their user or station licensing configuration to allow ACD routing of the social conversation interaction type. The agents must also belong to a workgroup that has an ACD queue and is associated with a social media channel.

For more information, see [Social Media Configuration](#).

An administrator can configure the ACD utilization rate to specify the number of social media interactions the agent can receive via ACD. For more information about ACD utilization, see the Interaction Administrator help and the *ACD Processing Technical Reference*.

Social Media Interactions in Interaction Connect

Agents receive and respond to social media interactions in Interaction Connect. Current functionality includes picking up, holding, recording, transferring, and disconnecting interactions.

Agents manage social interactions in the My Interactions and Current Interaction views.

Agents can respond to direct messages in Interaction Connect, but cannot initiate a direct message exchange.

For a description of the social media features in Interaction Connect, see the Interaction Connect help.

Social Media Configuration

The following are configurable options that are required or available for processing of social conversation interactions.

- [Licensing](#)
- In Interaction Administrator:
 - Configure users and workgroups for social media interactions ([User and Workgroup Configuration in Interaction Administrator](#))
 - Configure stations for social media interactions ([Station Configuration](#))
- In Interaction Connect:
 - Enable social media
 - Create a social media account
 - Create Facebook and Twitter ([Channel Configuration](#))
- In DSEdit, you have the option to change the polling limit (how often polling occurs) and the number of posts requested ([Poll Interval and Post Limit](#)).

Licensing

The social media feature requires these licenses:

| License | Description |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------|
| I3_FEATURE_SOCIAL_MEDIA | This CIC server feature license enables the social media feature on the server. |
| I3_ACCESS_ACD_SOCIAL_MEDIA | This license, assigned to users and/or stations, enables agents to receive ACD-routed social conversation interactions. |

For more information about licenses in general, see the *PureConnect Licensing Technical Reference*.

For more information about required configuration settings, see [User and Workgroup Configuration in Interaction Administrator](#).

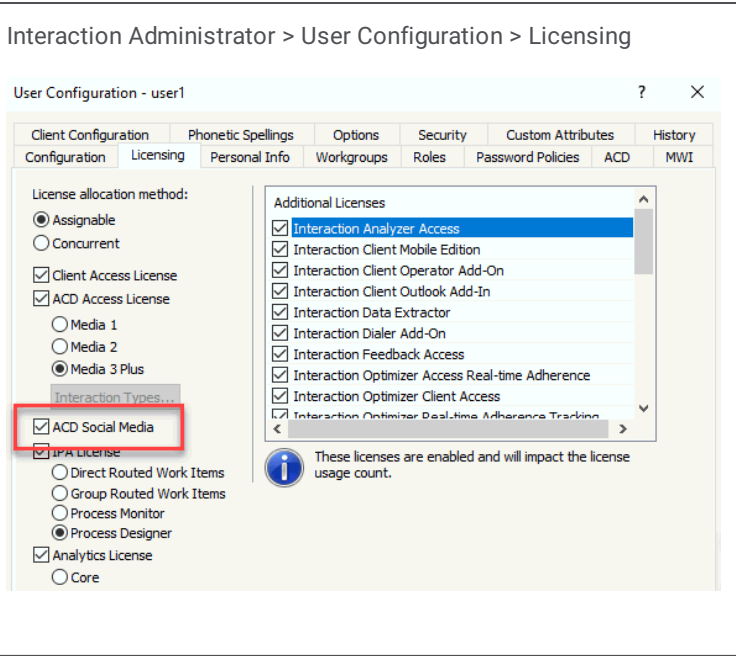
Note: Loading a new license does not require a restart of the server. Updates are made dynamically.

User and Workgroup Configuration in Interaction Administrator

User and workgroup configuration settings in Interaction Administrator indicate whether an agent can receive social media interaction, how many social conversation interactions they can receive, and the target service level for handling them.

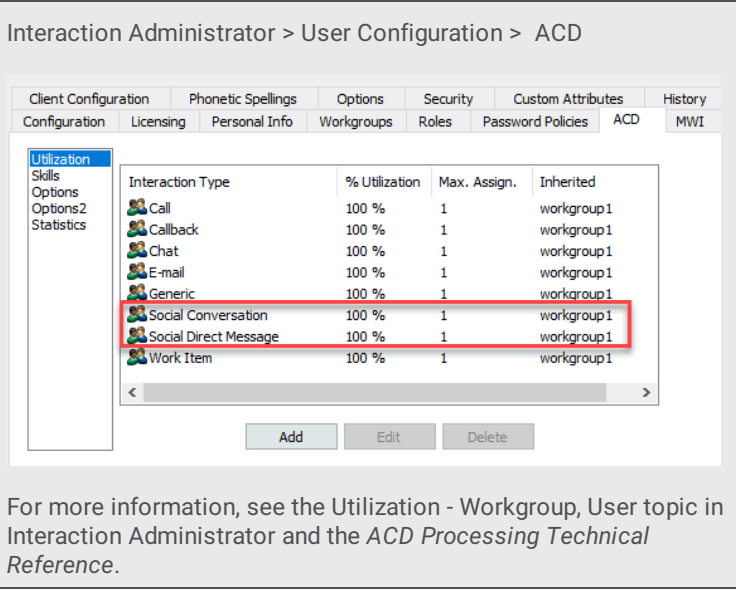
ACD Social Media option

Enables or disables the agent's availability to receive social media conversations.



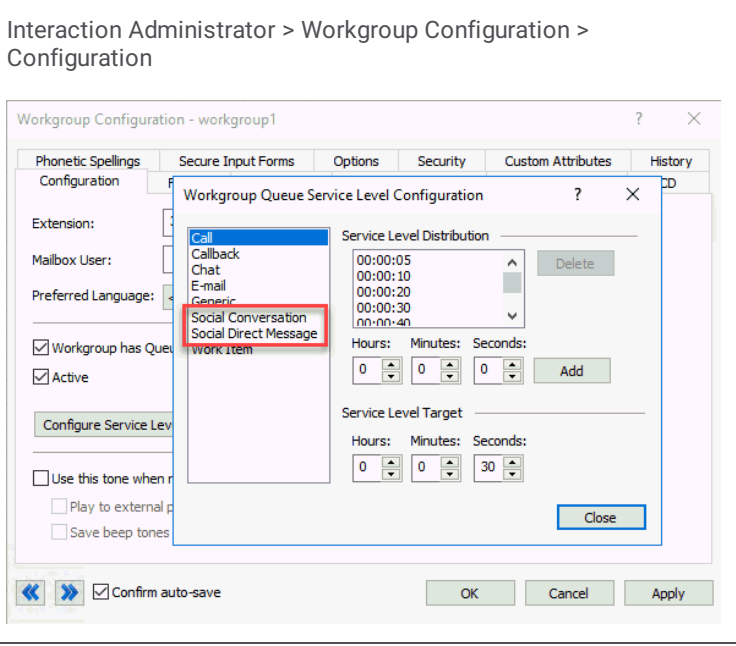
ACD Utilization rate

Specifies how many social media conversations an agent can receive via ACD.



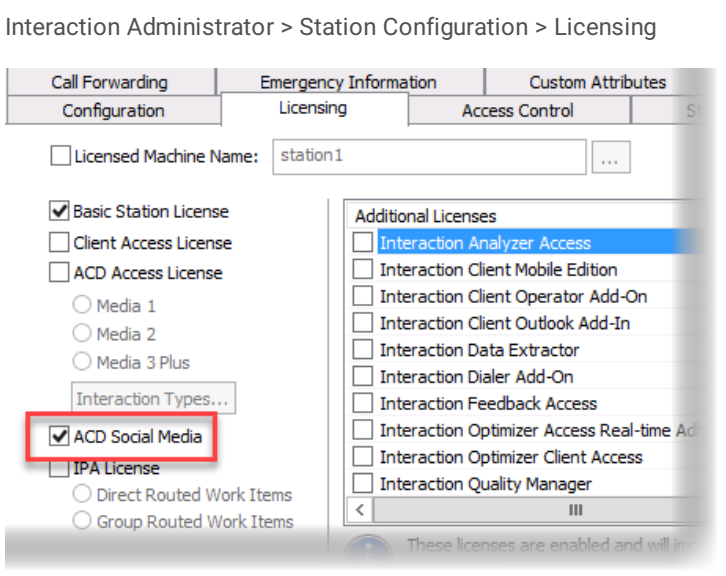
Workgroup Queue Service Level

Specifies the target service level (amount of time) for handling social media conversations.



Station Configuration

Station configuration settings in Interaction Administrator indicate whether an agent connected to a station can receive social conversation interactions.

| | | |
|-------------------------|------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ACD Social Media option | Enables or disables routing of social media interactions to an agent connected to the station. |  <p>Interaction Administrator > Station Configuration > Licensing</p> <p>Call Forwarding Configuration Emergency Information Licensing Custom Attributes Access Control</p> <p><input type="checkbox"/> Licensed Machine Name: station1</p> <p><input checked="" type="checkbox"/> Basic Station License <input type="checkbox"/> Client Access License <input type="checkbox"/> ACD Access License <input type="radio"/> Media 1 <input type="radio"/> Media 2 <input type="radio"/> Media 3 Plus Interaction Types... <input checked="" type="checkbox"/> ACD Social Media <input type="checkbox"/> IPA License <input type="radio"/> Direct Routed Work Items <input type="radio"/> Group Routed Work Items</p> <p>Additional Licenses <input type="checkbox"/> Interaction Analyzer Access <input type="checkbox"/> Interaction Client Mobile Edition <input type="checkbox"/> Interaction Client Operator Add-On <input type="checkbox"/> Interaction Client Outlook Add-In <input type="checkbox"/> Interaction Data Extractor <input type="checkbox"/> Interaction Dialer Add-On <input type="checkbox"/> Interaction Feedback Access <input type="checkbox"/> Interaction Optimizer Access Real-time Ad <input type="checkbox"/> Interaction Optimizer Client Access <input type="checkbox"/> Interaction Quality Manager</p> |
|-------------------------|------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Note: ACD routing of social media interactions works when either the station or the user has the ACD Social Media access license.

Channel Configuration

As an administrator, you can create and configure channels in Interaction Connect. Each channel associates a Facebook page or Twitter with an ACD workgroup.

Facebook channels associate Facebook pages with ACD workgroups. Facebook conversations on the specified page become social conversation interactions and are routed to the specified workgroup.

Twitter channels associate Twitter handles and keywords with ACD workgroups. Tweets that include the specified Twitter handles or the specified keywords become social conversation interactions and are routed to the specified workgroup.

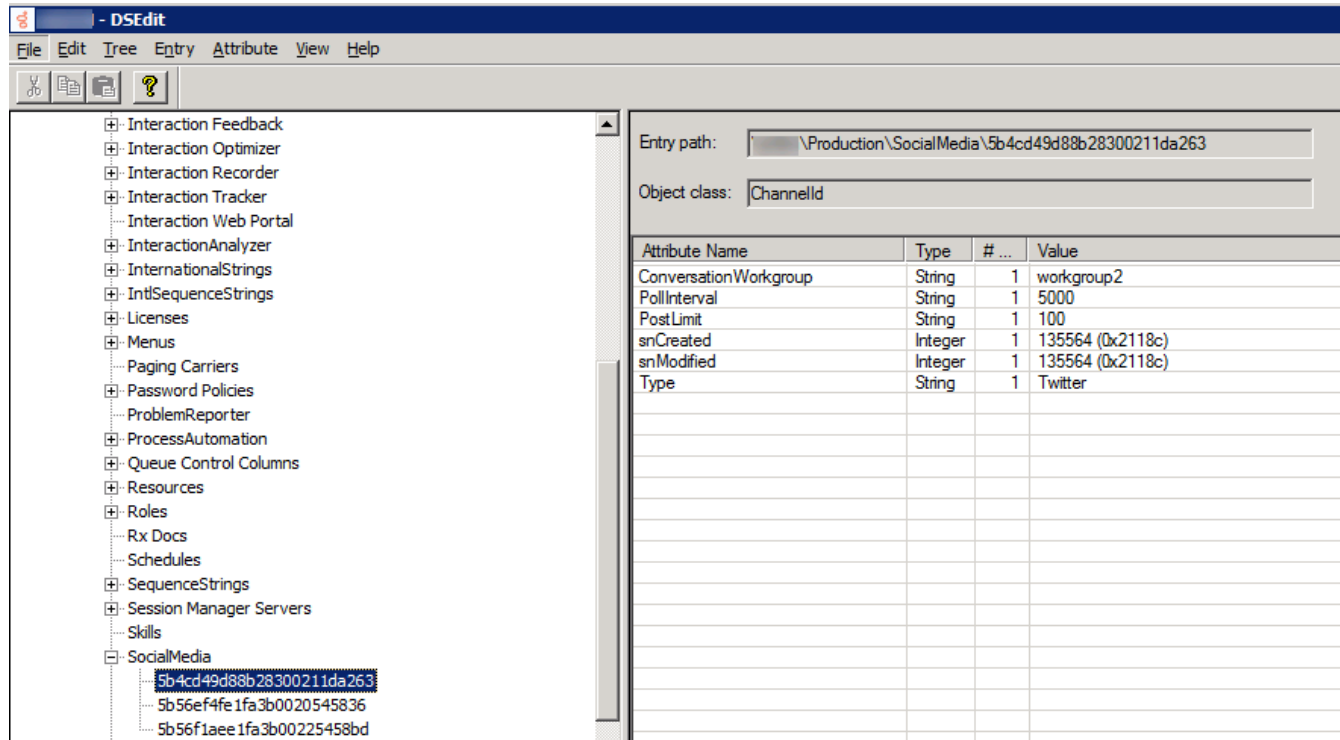
You can add and configure channels in Interaction Connect, as long as you have the **Social Media Admin** right.

To enable social media, add a social media account, and configure Facebook and Twitter channels, refer to the Interaction Connect help.

Poll Interval and Post Limit

Attributes in DSEdit allow you to specify how often PureConnect polls Facebook and Twitter for new posts (PollInterval attribute), as well as the number of requested posts (PostLimit attribute).

By default, PureConnect attempts to fetch 100 posts every five seconds. You have the option to change those values.



The screenshot shows the DSEdit application interface. On the left is a tree view of system components, with 'SocialMedia' expanded to show three GUIDs: '5b4cd49d88b28300211da263', '5b56ef4fe1fa3b0020545836', and '5b56f1aee1fa3b00225458bd'. The right pane shows configuration for the selected object. The 'Entry path' is '\\Production\SocialMedia\5b4cd49d88b28300211da263' and the 'Object class' is 'ChannelId'. Below this is a table of attributes:

| Attribute Name | Type | # ... | Value |
|-----------------------|---------|-------|------------------|
| ConversationWorkgroup | String | 1 | workgroup2 |
| PollInterval | String | 1 | 5000 |
| PostLimit | String | 1 | 100 |
| snCreated | Integer | 1 | 135564 (0x2118c) |
| snModified | Integer | 1 | 135564 (0x2118c) |
| Type | String | 1 | Twitter |

CIC Server

The CIC server processes social conversation interactions routed to a workgroup, just as it processes other types of interactions.

Toolsteps and Initiators

The Query Media Type toolstep, which determines an interaction's media type, has two new exit paths:

- Social conversation
- Social direct message

There are two new initiators:

- Transfer Conversation
- Transfer Direct Message

For more information about the toolstep and initiators, see the Interaction Designer help.

Change log

| Date | Changes |
|------------------|--------------------------------------------------------------------------|
| 6-August-2018 | Created |
| 12-December-2018 | Added support for Twitter direct messages and Facebook private messages. |