PureConnect®

2020 R4

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See Change Log for summary of changes.

GENESYS™

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/pureconnect.

Table of Contents

Social Media in PureConnect

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

PureConnect also contains features for social media recordings and analytics.

For information about PureConnect applications that support social media, see Social Media Supported PureConnect Applications.

Facebook and Twitter

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 public messages, Facebook private messages, and Twitter direct messages.

For more information about the Facebook integration, see Facebook.

For more information about the Twitter integration, see Twitter.

WhatsApp

A 2020 R2 patch release introduced support for receiving and replying to inbound WhatsApp direct messages as part of the Early Access Program. WhatsApp support is also available in patches for the 2019 R4 and 2020 R1 releases. Contact your sales representative for more information about the Early Access Program.

For more information about the WhatsApp integration, see WhatsApp.

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Facebook

As an administrator, you create one or more *channels* for Facebook public messages and private messages. A Facebook channel associates a CIC workgroup with a Facebook page.

PureConnect pulls messages from 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.

More Facebook Information

For more information about...	See...
PureConnect applications that support social media applications	Social Media Related Applications
Social media components	Social Media Components for Facebook and Twitter
ACD routing of Facebook messages	ACD Routing of Social Media Interactions
Facebook interactions in Interaction Connect	Social Media Interactions in Interaction Connect
Licensing and configuration (users, workgroups, stations)	Social Media Configuration
Channel configuration in Interaction Connect	Channel Configuration
Interaction Designer social media tools and initiators	Toolsteps and Initiators
Switchover and recovery	Interaction Recovery for Social Media Interactions

Twitter

As an administrator, you create one or more *channels* for Twitter public messages and direct messages. A Twitter channel associates a CIC workgroup with a Twitter handle.

PureConnect pulls messages from Twitter 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.

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.

More Twitter Information

For more information about...	See...
PureConnect applications that support social media applications	Social Media Related Applications
Social media components	Social Media Components for Facebook and Twitter
ACD routing of Twitter messages	ACD Routing of Social Media Interactions
Twitter interactions in Interaction Connect	Social Media Interactions in Interaction Connect
Licensing and configuration in Interaction Administrator (users, workgroups, stations)	Social Media Configuration
Channel configuration in Interaction Connect	Channel Configuration
Interaction Designer social media tools and initiators	Toolsteps and Initiators
Switchover and recovery	Interaction Recovery for Social Media Interactions

WhatsApp

As an administrator, you create a channel for WhatsApp direct messages. A WhatsApp channel associates a CIC workgroup with a WhatsApp phone number.

PureConnect pulls messages from WhatsApp through the Genesys Cloud platform and passes them to the CIC server for processing as Social Direct Message interactions. Each interaction is routed to the workgroup that is associated with the channel that pulled in the message.

The WhatsApp integration involves an onboarding process. The integration requires your company to have a verified Facebook Business Manager account. For more information, see *Preparing for the WhatsApp Integration* section below.

WhatsApp example

A company wants to manage direct messages from customers who prefer to use a WhatsApp messaging channel.

PureConnect processes WhatsApp direct messages as follows:
1. A customer of the company or a third party sends a direct message to a designated WhatsApp channel.
2. PureConnect creates a social media interaction and ACD routes it to a workgroup associated with the phone number on the company's WhatsApp accounts.
3. An agent in the workgroup picks up and responds to the message in the Current Interactions view in Interaction Connect, just as they receive and pick up other types of interactions..
4. The interaction continues until the agent disconnects it. After the agent disconnects the interaction, any additional reply or comment for that direct message initiates a new interaction.

Preparing for the WhatsApp Integration

To start the process of preparing for the WhatsApp integration, work with your sales representative or customer success manager.
- Your company must have a verified Facebook Business Manager account.
  To apply for a Facebook Business Manager account if you don't already have one, see
  https://www.facebook.com/business/help/1710077379203657.
- Your Business Manager administrator will receive a notification to approve Genesys to manage WhatsApp messaging on your company's behalf. After approval of this request, customer must complete business verification.
  https://www.facebook.com/business/help/2058515294227817

There may be other onboarding requirements. For more information, contact your sales representative or customer success manager.

Genesys Cloud Requirements for WhatsApp

WhatsApp messages are processed in Genesys Cloud (formerly PureCloud). Therefore, your company needs to have a Genesys Cloud organization with a PureCloud 3 license and be able to authenticate with Genesys Cloud.

Along with the Genesys Cloud organization, you'll need the following related information:
- Administrator email and password
- Organization short name
- Region

To obtain a Genesys Cloud organization and the related information, contact your sales representative or customer success manager.

In Genesys Cloud, you need the following:
- The product messagingPlatformWhatsApp
- These permissions:
  - messaging:whatsAppIntegration:{add|delete|edit|view}
  - messaging:message:send

For more information about configuring the connection with Genesys Cloud, see the Genesys Cloud for PureConnect Administrator's Guide.

For more information about products and permissions in Genesys Cloud, see Products, Roles, and Permissions in the Genesys Cloud resource center.

More WhatsApp Information

For more information about...	See...
PureConnect applications that support social media applications	Social Media Related Applications
Social media components	Social Media Components for WhatsApp
ACD routing of WhatsApp messages	ACD Routing of Social Media Interactions
WhatsApp interactions in Interaction Connect	Social Media Interactions in Interaction Connect
Licensing and configuration in Interaction Administrator (users, workgroups, stations)	Social Media Configuration
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Interaction Designer social media tools and initiators	Toolsteps and Initiators
Switchover and recovery	Interaction Recovery for Social Media Interactions

Social Media Components -- Facebook and Twitter

The social media feature for Facebook and Twitter 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.
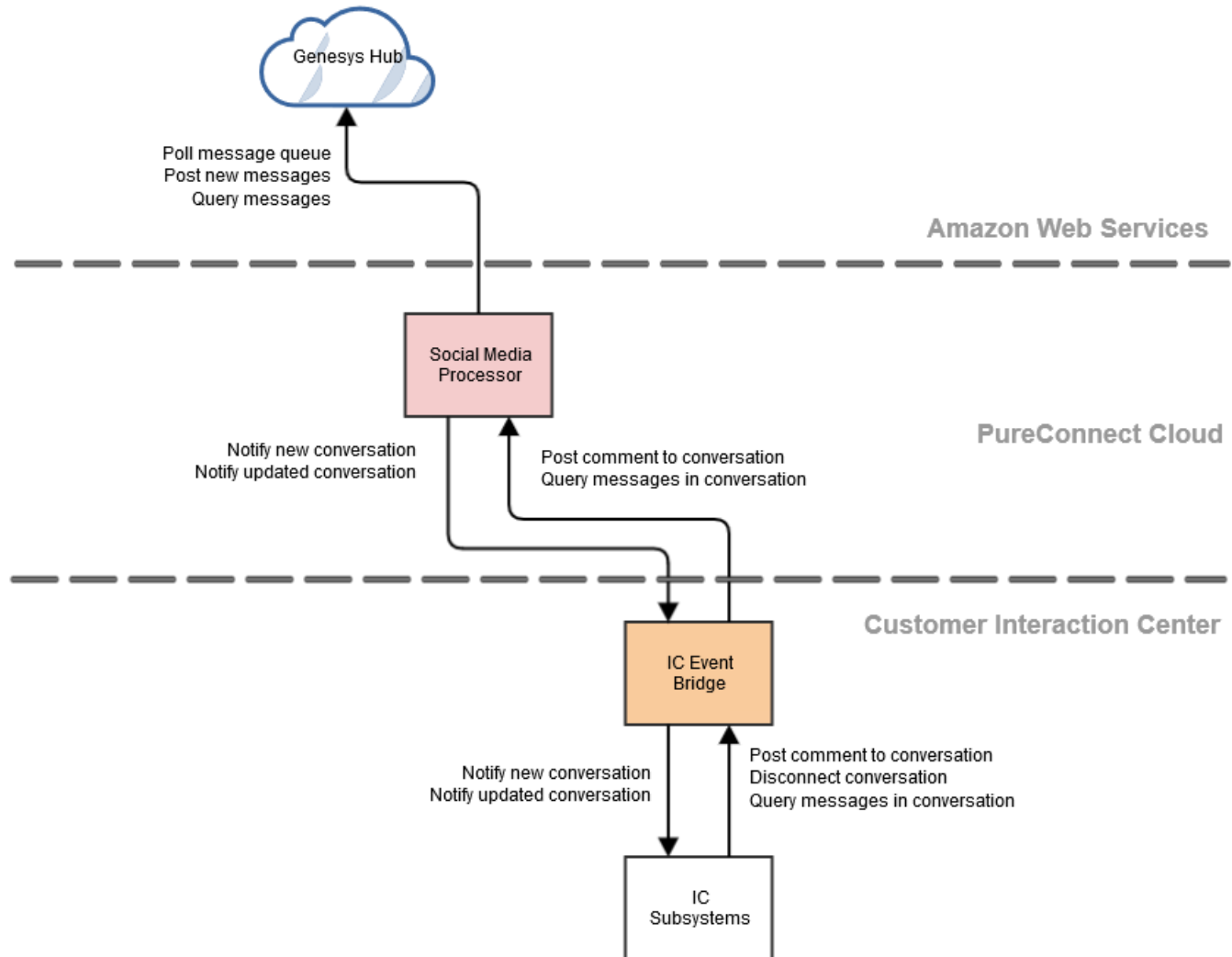
Social Media Components -- WhatsApp

For WhatsApp, PureConnect uses the Genesys Cloud (formerly PureCloud) digital messaging platform. The WhatsApp integration between PureConnect and Genesys Cloud includes these components:

- The **Social Media Processor** processes and caches data for Customer Interaction Center.
- The Messaging Platform from Genesys Cloud provides the capability to send/receive messages for WhatsApp communication.
- 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.
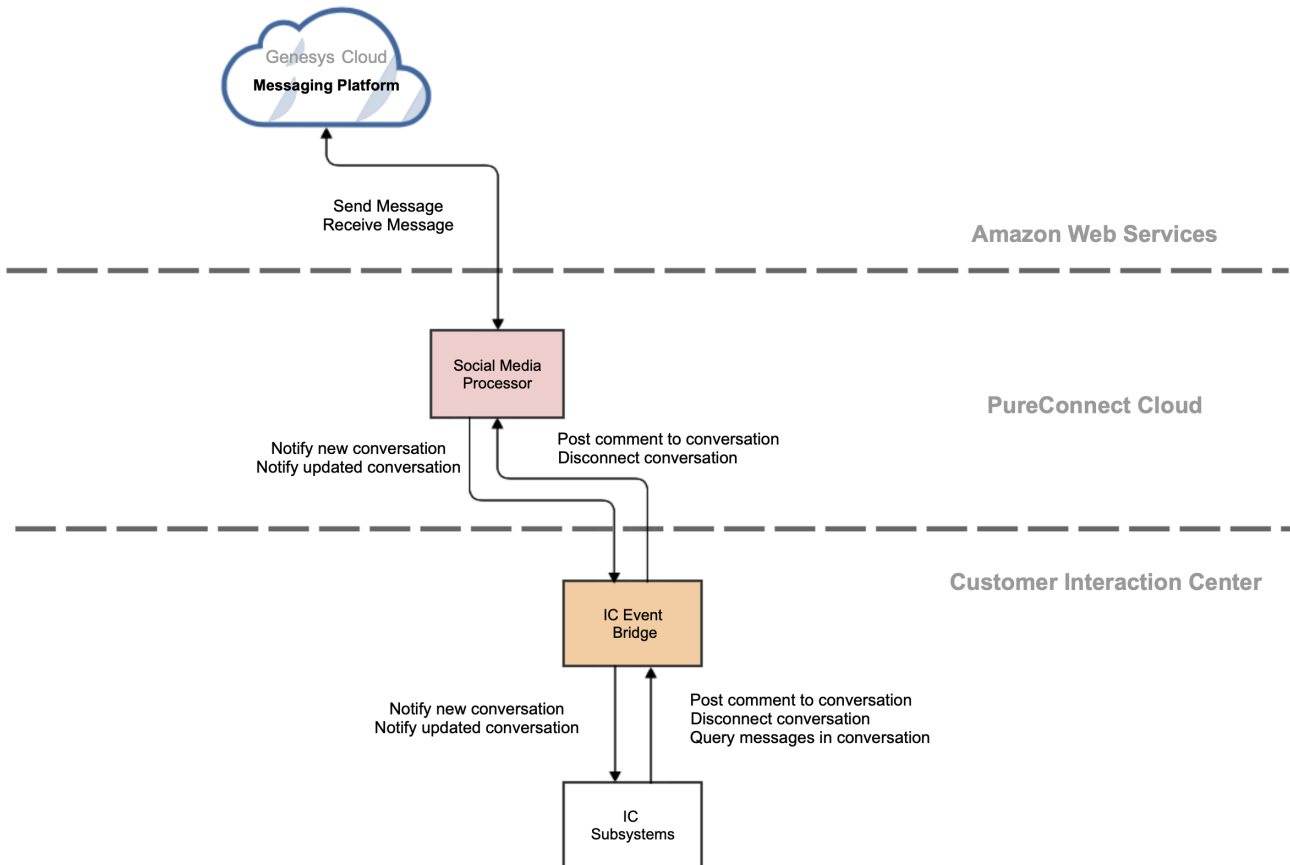
Social Media Supported PureConnect Applications

The following PureConnect applications support social media applications.

Application	Description	For more information
Interaction Connect	In the **Current Interaction** view in Interaction Connect, agents can 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 is also where administrators configure social media channels.	Interaction Connect help
Interaction Tracker	Administrators and supervisors can search for social media interactions and view the details in the **Interaction Details** view in Interaction Tracker..	Interaction Desktop help
Interaction Recorder	Supervisors can 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	Supervisors can create initiation, retention, and security policies for recording social media conversations.	Interaction Recorder Policy Editor help
Interaction Designer	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	Statistics for the longest social conversation and active social conversations are available. The social conversation media type is available 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* at https://help.genesys.com/cic/mergedProjects/wh_tr/desktop/pdfs/acd_processing_TR.pdf.

The social media interaction types are Social Conversation for public Facebook and Twitter messages, and Social Direct Message for Facebook private messages, Twitter direct messages, and WhatsApp 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* at https://help.genesys.com/cic/mergedProjects/wh_tr/desktop/pdfs/acd_processing_TR.pdf.

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 Managing Social Media in the Interaction Connect help.

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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

Facebook and Twitter require these licenses:

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

WhatsApp requires these licenses:

License	Description
I3_FEATURE_WHATSAPP_SOCIAL_MEDIA	This CIC server feature license enables the WhatsApp feature on the server.
I3_ACCESS_ACD_WHATSAPP	This license, assigned to users and/or stations, enables agents to receive WhatsApp 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 the *Interaction Administrator Help*.

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

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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.

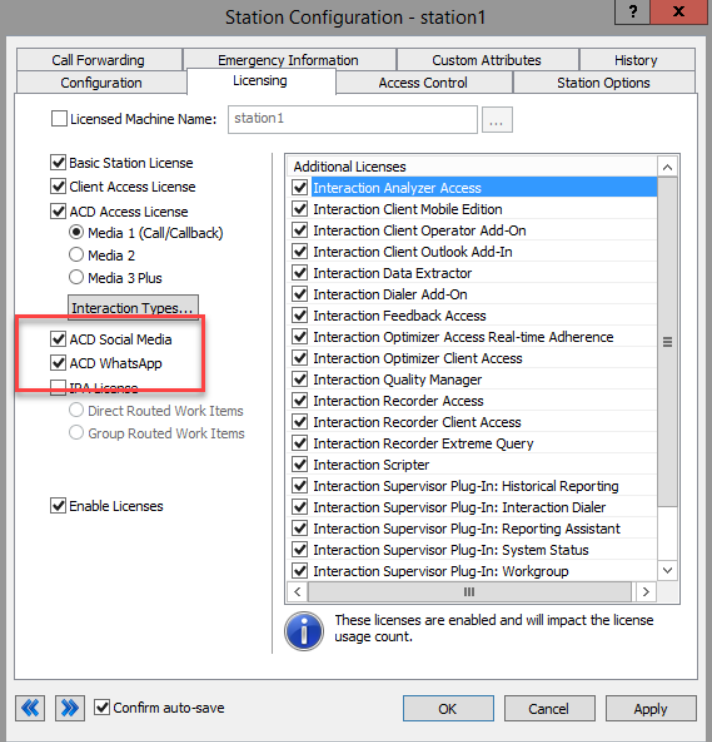|		
ACD Social Media option ACD WhatsApp	Enables or disables the agent's availability to receive Facebook and Twitter social media conversations. Enables or disables the agent's availability to receive WhatsApp interactions, if configured.	**Interaction Administrator > User Configuration > Licensing**
ACD Utilization rate	Specifies how many social media conversations an agent can receive via ACD.	**Interaction Administrator > User Configuration > ACD** For more information, see the following: • "Utilization - Workgroup, User" in the *Interaction Administrator Help* at https://help.genesys.com/cic/mergedProjects/wh_ia/desktop/interaction_administrator_help.htm • *ACD Processing Technical Reference* at https://help.genesys.com/cic/mergedProjects/wh_tr/desktop/pdfs/acd_processing_TR.pdf

Workgroup Queue Service Level	Specifies the target service level (amount of time) for handling social media conversations.	**Interaction Administrator > Workgroup Configuration > Configuration**

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 Facebook and Twitter social media interactions to an agent connected to the station.	**Interaction Administrator > Station Configuration > Licensing**
ACD WhatsApp option	Enables or disables routing of WhatsApp interactions to an agent on the station.	

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, Twitter handle, or WhatsApp phone number 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, Twitter, and WhatsApp 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.

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.

Interaction Recovery for Social Media Interactions

Two server parameters enable recovery of social media interactions after a switchover.

- **Socialconversation Interaction Recovery Enabled** enables switchover support for social conversation interactions. Add this parameter and assign it a non-zero integer.
- **Directmessage Interaction Recovery Enabled** enables switchover support for social media direct message interactions. Add this parameter and assign it a non-zero integer.

After you enable the parameter and restart the backup server, the Interaction Recovery Service subsystem performs a full synchronization of Social Conversation interactions and Social Direct Message interactions with the active server.

Other ways to recover social media interactions:

- If the end customer adds a reply to a social media conversation, the conversation comes back into the system as an interaction with the content of the conversation to that point.
- If the agent or someone with access to the social media accounts on Facebook and Twitter goes into the platform directly and replies in the conversation, the conversation comes back into the system as an interaction.

Change log

The following table lists the changes to the *Social Media Technical Reference* since its initial release.

Date	Changes
6-August-2018	Created
12-December-2018	Added support for Twitter direct messages and Facebook private messages.
14-June-2019	Reorganized the content only, which included combining some topics and deleting others that just had an introductory sentence such as, "In this section...".
06-May-2020	Added support for WhatsApp direct messages.
11-June-2020	Corrected WhatsApp feature license name.
08-July-2020	Updated to add requirement for PureCloud 3 license.
19-October-2020	Added a link to the Interaction Connect help.

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