



**PureConnect®**

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# 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>.

For copyright and trademark information, see [https://help.genesys.com/pureconnect/desktop/copyright\\_and\\_trademark\\_information.htm](https://help.genesys.com/pureconnect/desktop/copyright_and_trademark_information.htm).

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# 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](#).

*[Copyright and trademark](#)*

# 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	<a href="#">Social Media Related Applications</a>
Social media components	<a href="#">Social Media Components for Facebook and Twitter</a>
ACD routing of Facebook messages	<a href="#">ACD Routing of Social Media Interactions</a>
Facebook interactions in Interaction Connect	<a href="#">Social Media Interactions in Interaction Connect</a>
Licensing and configuration (users, workgroups, stations)	<a href="#">Social Media Configuration</a>
Channel configuration in Interaction Connect	<a href="#">Channel Configuration</a>
Interaction Designer social media tools and initiators	<a href="#">Toolsteps and Initiators</a>
Switchover and recovery	<a href="#">Interaction Recovery for Social Media Interactions</a>

# 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	<a href="#">Social Media Related Applications</a>
Social media components	<a href="#">Social Media Components for Facebook and Twitter</a>
ACD routing of Twitter messages	<a href="#">ACD Routing of Social Media Interactions</a>
Twitter interactions in Interaction Connect	<a href="#">Social Media Interactions in Interaction Connect</a>
Licensing and configuration in Interaction Administrator (users, workgroups, stations)	<a href="#">Social Media Configuration</a>
Channel configuration in Interaction Connect	<a href="#">Channel Configuration</a>
Interaction Designer social media tools and initiators	<a href="#">Toolsteps and Initiators</a>
Switchover and recovery	<a href="#">Interaction Recovery for Social Media Interactions</a>

# 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	<a href="#">Social Media Related Applications</a>
Social media components	<a href="#">Social Media Components for WhatsApp</a>
ACD routing of WhatsApp messages	<a href="#">ACD Routing of Social Media Interactions</a>
WhatsApp interactions in Interaction Connect	<a href="#">Social Media Interactions in Interaction Connect</a>
Licensing and configuration in Interaction Administrator (users, workgroups, stations)	<a href="#">Social Media Configuration</a>
Channel configuration in Interaction Connect	<a href="#">Channel Configuration</a>
Interaction Designer social media tools and initiators	<a href="#">Toolsteps and Initiators</a>
Switchover and recovery	<a href="#">Interaction Recovery for Social Media Interactions</a>

## PureConnect WhatsApp Service Onboarding Guide

WhatsApp needs a WhatsApp Business connector that allows connecting with Customers (and customers with consumers) from the WhatsApp Messenger App. It offers a good consumer experience integrated with notification and contact center software.

WhatsApp allows customers to manage the agent side of the WhatsApp experience from PureConnect.

WhatsApp onboarding helps in setting up one or more WhatsApp channels in PureConnect. For more information, contact the Customer Care team.

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## Prerequisites

The customer must acquire the following information for WhatsApp service.

### Genesys Cloud and PureConnect Licenses

A WhatsApp service is a hybrid feature. You need licenses and part numbers.

#### Licenses

- CC1 or Agent license with Hybrid digital Messaging Bundle.
- I3\_FEATURE\_WHATSAPP\_SOCIAL\_MEDIA and I3\_ACCESS\_ACD\_WHATSAPP

#### Part Numbers

CS-012-NV-WHATSAPP-HYB or CS-012-NV-WHATSAPP-C-HYB

GC-170-NV-DIGHYBUN

### Customer Information Form

PureConnect Product Management team needs some customer-specific information to set up and configure the WhatsApp account (WABA). See, [Customer Information Form](#).

Fill the Customer Information Form and send it to [ProductManagement-PureConnect@genesys.com](mailto:ProductManagement-PureConnect@genesys.com).

### WhatsApp Approval

A customer must apply for WhatsApp approval to use the service and must be approved by WhatsApp. WhatsApp doesn't allow the customer to operate without approval.

**Note:** Purchase of PureConnect from Genesys doesn't provide approval by WhatsApp to use the WhatsApp Business API.

#### WhatsApp restrictions, which Genesys must enforce:

Customer cannot send messages to Syria, North Korea, Cuba, Iran, and Crimea (both Ukrainian and Russian phone numbers)

WhatsApp evaluates government agencies and related organizations on a case-by-case basis.

WhatsApp doesn't allow customers from specific industries to use it. For more information, see

<https://www.whatsapp.com/legal/commerce-policy/>.

### Designated Phone Numbers for WhatsApp

The customer must have at least one designated phone number for the business to start using WhatsApp. Each phone number must comply with WhatsApp's requirements to receive phone calls or text messages. For more information, see

<https://developers.facebook.com/docs/whatsapp/guides/phonenumber>.

### Customer Facebook Business Manager ID

The customer must have a business ID to process the application. Most customers already have business IDs, but if they don't, they must create a business ID with Facebook. For more information, see

<https://business.facebook.com/business/help/1612355968988019>.

### Verification of Customer Facebook Business Manager

The customer must have a verified Facebook Business Manager as a prerequisite.

In **Business Manager**, navigate to **Business Settings**.

Click **Security Center**.

Click **Start Verification**.

Enter customer business information and attach documents if necessary.

For more information about accepted documents, refer to [Facebook document guide](#).



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## WhatsApp Channel Process Overview

To get a WhatsApp channel up and running, follow the steps listed below. For detailed instructions, see the following pages.

Steps	Description	Responsible	Action to be taken
1	<a href="#">Provision Genesys Cloud Organization for PureConnect</a>	Genesys (GC)	This will be a part of the GC order. The request must be made through JIRA.
2	<a href="#">Integrate PureConnect with Cloud Organization</a>	Genesys (Admin)	In Interaction Administrator, set up Administrator credentials, Organization short name, and Region.
3	<a href="#">Set up a WABA (WhatsApp Business Account) in Facebook on behalf of end-customer</a>	Genesys (PM)	Setting up Facebook Business Manager (FBM) for WABA.
4	<a href="#">Set up WhatsApp channel in WABA</a>	Genesys (PM)	Set up your WhatsApp channel name and WhatsApp phone number in FBM.
5	WhatsApp approval for Customer	WhatsApp/FB	Facebook has a two-step approval process for WhatsApp accounts with a predefined lead time.
6	<a href="#">Social Media Console - WhatsApp channel creation</a>	Customer (Admin)	The channel name, the phone number, and the WABA certificate must be set up.
7	Authentication by WhatsApp	Customer (FBM)	Verifying a phone number via WhatsApp.

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## Provision Genesys Cloud Organization for PureConnect

A Genesys organization ID should be created for the hybrid feature. As WhatsApp is a hybrid service that uses Genesys cloud end points so to enable WhatsApp feature for PureConnect, Genesys Cloud Organization and permissions are required. The Organization ID and permissions are created by Genesys Cloud team as part of Genesys Cloud Order.

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## Integrate PureConnect with Cloud Organization

To use WhatsApp in PureConnect, the Genesys Cloud integration must be completed. To complete the integration, follow the steps from [Genesys Cloud Configuration](#) in Interaction Administrator.

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## Setting WhatsApp Business Administration

### Overview of WhatsApp Business Administration

Genesys creates a WhatsApp Business Administration (WABA) on behalf of the customer to access the WhatsApp Business API.

WABAs cannot be created by partners or owned by partners. Partners also cannot use their own Facebook Business Manager IDs for the creation of WABAs. It must be the Customer's Facebook Business Manager ID. In the WABA, the below is managed for a customer:

- It is the customers phone numbers that are used to manage the channels that the customer wants to manage (each phone number must be set up with a separate channel).

### Creating a WABA

The customer cannot own their own WABA. Genesys creates the WABA, using the Facebook Business Manager ID of the customer.

To view the **Facebook Business Manager ID**, do the following:

Navigate to the **Facebook Business Settings** page.

Click **Business Info**.

On the **Facebook Business Manager Info** page, view the **Business Manager ID**.

Business Settings

**Users**

- People
- Partners
- System Users

**Accounts**

- Pages
- Ad Accounts
- Apps
- Instagram Accounts
- Line of Business
- WhatsApp Accounts
- Projects

Data Sources

Brand Safety

Registrations

Integrations

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Payments

Security Center

Requests

Notifications

**Business Info**

Setup Guide

**Business Manager Info**

**Genesys**  
 Business Manager ID:   
 Primary Page: **None**

**Business Details**

**Business Verification Status** ✔ **Verified**  
 Aug 6, 2018

**Legal Name of Business** Genesys Telecommunications Laboratories, Inc.

**Address**  
 2001 Junipero Serra Blvd  
 Daly City, CA 94104  
 United States

**Business Phone**

**Website** <https://www.genesys.com/>

**Tax ID** No tax ID

**Business Options**

**Two-Factor Authentication** Require a login code to access Business Manager from unknown browsers.

**Pages and Notifications** Allow people in your business to create posts, boost posts and see business notifications from your Page and in Business Manager. If this setting is turned off then they can only take these actions in Business Manager and cannot publish Page stories from the Page.

**Created** May 3, 2017 by

**Updated** June 26, 2019 by

Ad Account Creation Limit:30

The following mistakes prevent the creation of the WABA:

- The Facebook Business Manager ID field must not be left blank or be replaced by a Facebook page ID or Facebook URL.
- WABA cannot be created until the customer supplies a valid Facebook Business Manager ID. If the partner or customer does not provide the correct ID, you must wait until the customer supplies the correct ID.

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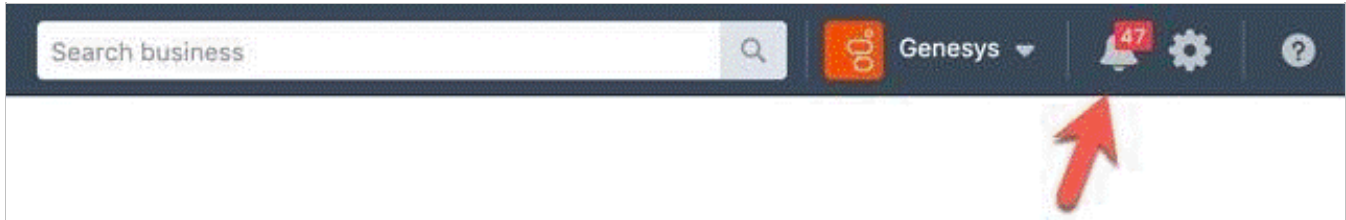
## Customer Approval Requirements

WhatsApp approves WABA in two-step process. You don't have to complete the steps in the same order as they appear. But both have to be completed before WhatsApp considers the WABA.

### Approve Genesys message on behalf of the customer

Genesys must be approved by the customer as the WhatsApp business service provider (BSP). WhatsApp will not approve the WABA without this approval.

Genesys must be approved as a WhatsApp business service provider (BSP) before WhatsApp approve the WABA.



An approval message is sent to the customer's Facebook Business Manager after the WABA is created. One of the customer's Facebook admins must check the notifications for this message and approve the "Message on behalf of" notification.

As soon as the customer approves the notification, Genesys can now find out if the brand has already been approved by Facebook Business Manager. If so, the next step can be omitted.

### Facebook Business Manager Verification

The customer must verify the Facebook Business Manager, if it has not already done. To verify, do the following:

In the **Facebook Business Manager** page.

Click **Business Settings** tab.

Click **Security Center** and the click **Start Verification**.

**Note:** Provide information about the customer business and attach documents as prompted. If you are not sure about the types of documents that Facebook accepts, view [Facebook's document guide](#).

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## WhatsApp Business Account (WABA) Approval

The WABA is ready for WhatsApp's approval after [Customer Approval Requirements](#) process. For approval do the following:

In the **Facebook Business Manager** page, click **Settings** tab.

Check for the **Business Name** status

Check for the **Business Verification** status.

Check for the **Account Status**.

**Note:** In the policy approval process, WhatsApp checks whether the customer's business complies with [WhatsApp commerce policy](#).

After WhatsApp approves the WABA, Genesys can create the first channel in the WABA.

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## Setting WhatsApp Channel in WABA

For setting up WhatsApp Channel in WABA, phone number must be added in the Facebook Business Manager. This is handled by Genesys Product Manager.

To add phone number, do the following:

In the **Facebook Business Settings** page, click **WhatsApp account**.

On the **WhatsApp Accounts** page, click **WhatsApp Manager**.

**Business Settings**

**WhatsApp accounts**

Filter by name or ID  [+ Add](#)

DigitalHydPC

**DigitalHydPC**  
Owned by: Genesys PureConnect ID: 987890034900451 [Remove](#)

[Add People](#)

People **Settings**

Manage your WhatsApp account settings

**Business name**  
Genesys PureConnect

**Business verification**  
● Verified

**Time zone**  
America/Los\_Angeles

**Local currency**  
INR - Indian Rupee

**Payment method**  
No Payment method found

**Account status**  
● Approved

[Edit](#)

[WhatsApp Manager](#)

On the WhatsApp Manager page, click Add Phone Number.

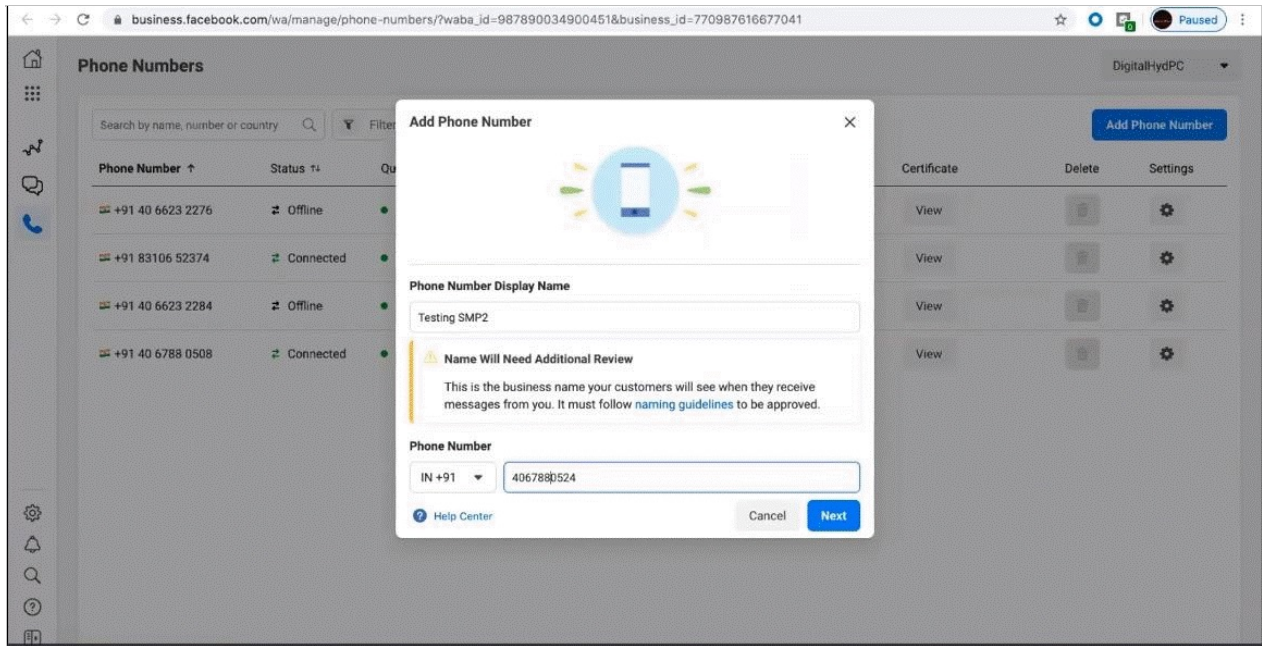
**Phone numbers** DigitalHydPC

Search by name, number or country   Filter

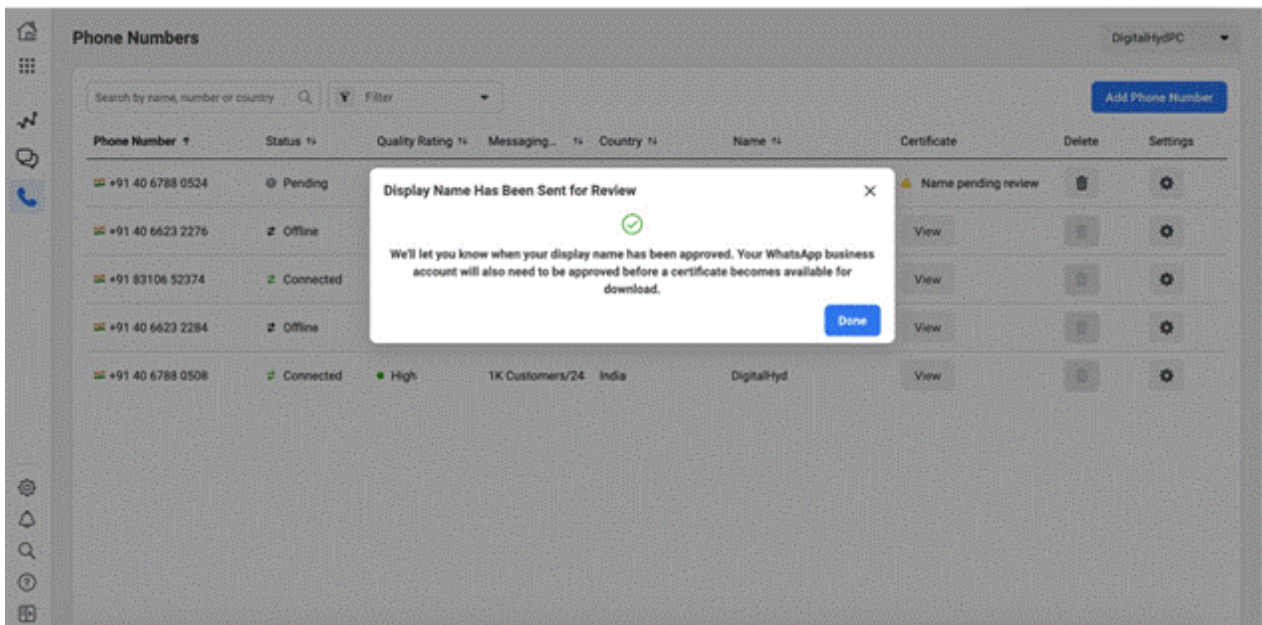
[Add Phone Number](#)

Phone number ↑	Status ↑	Quality rating ↑	Messaging Limit ↑	Country ↑	Name ↑	Certificate	Delete	Settings
IN +91 40 6623 2276	Offline	High	1K Customers/24hr	India	Digital Hyd4	<a href="#">View</a>	<a href="#">Delete</a>	<a href="#">Settings</a>
IN +91 83106 52374	Connected	High	1K Customers/24hr	India	DigitalHyd3	<a href="#">View</a>	<a href="#">Delete</a>	<a href="#">Settings</a>
IN +91 40 6623 2284	Offline	High	1K Customers/24hr	India	Testing SMP1	<a href="#">View</a>	<a href="#">Delete</a>	<a href="#">Settings</a>
IN +91 40 6788 0508	Offline	High	1K Customers/24hr	India	DigitalHyd	<a href="#">View</a>	<a href="#">Delete</a>	<a href="#">Settings</a>





Enter the phone number in the **Phone Number** box.  
Click **Next**.



**Note:** The name provided by the customer appears.

After creating a new channel, WhatsApp conducts a Channel Name review to make sure that the name of the channel is compliant with their guidelines. For guidelines information, see <https://developers.facebook.com/docs/whatsapp/guides/vname>.

**Note:** A channel name that complies with the rules will be approved. If not, the customer must choose another name for the channel.

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## Create WhatsApp Channel in Social Media Admin Console

To create a WhatsApp Channel, follow the steps from [Configure a WhatsApp channel](#) in Interaction Connect. A WABA certificate will be available in Facebook business manager once the display name and phone number are approved by WhatsApp. The Genesys Product Manager will share the certificate for a specific number with the customer.

The following mistakes prevent the onboarding process:

Ensure that your channel name complies with WhatsApp policies since it appears as the phone display name to consumers in WhatsApp Messenger. For more information about WhatsApp policies, see

<https://developers.facebook.com/docs/whatsapp/guides/vname>.

The channel name or the customer name in all Caps. The channel name contains the term WhatsApp.

Using the incorrect spelling of the customer name. For example, if the customer name is ACME Bread, WhatsApp requires the exact name of the customer. For this reason, using ACMEBread or Acme Bread in the channel name will be rejected by WhatsApp.

Abbreviations should be avoided. For example, you might understand that ACME Bread CC means ACME Bread's Contact Center, but WhatsApp doesn't. Make sure that the abbreviation is spelled out or remove.

Business phone numbers can be used as phone numbers in WhatsApp for interacting with consumers. For more information, see

<https://developers.facebook.com/docs/whatsapp/guides/phonenumber>.

A phone number has already been connected to WhatsApp through the business API or through the WhatsApp business applications for Android and iOS

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## Configure Multiple WhatsApp Channels

The steps in [Setting WhatsApp Business Administration](#) apply to every new WhatsApp phone number that you plan to operate. For example, if you purchased multiple WhatsApp numbers for running multiple WhatsApp channels, you must configure a channel for each new WhatsApp phone number.

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## Update Business Profile Details

It is optional for the customer to provide business details on WhatsApp, but it is recommended. The following information from the customer must be provided to Genesys for changes to be made.

Standard Profile	Details	Specifications
Photo	The company photo is displayed to end customers in WhatsApp.	Photo size must be 640x640, PNG format recommended.
About	Short About status, displayed above phone number in WhatsApp profile.	Max 139 chars
Business Profile	It is optional - must provide all fields if using any of them	
Address	Business Address	Max 256 chars
Description	Description of business, services, mission, etc.	Max 256 chars
Email	Public email displayed to end customers.	Max 128 chars
Vertical	Public short industry vertical / category descriptor.	Max 128 chars
Websites	Up to 2 public website URLs	Max 256 chars, each

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## Appendix A: Frequently Asked Questions (FAQ)

Following are FAQs and their answers:

**What are acceptable uses of WhatsApp for Genesys Cloud?**

For acceptable use, see WhatsApp's [Commerce Policy](#) and [Business Policy](#). If you repeatedly violate their policies, WhatsApp may limit the number of customers you can message or suspend your account. Additionally, WhatsApp may decline to approve customers whose primary business functions overlap with its policies; it evaluates these cases on a case-by-case basis. Furthermore, WhatsApp may decline to approve customers whose primary business functions differ from its policies.

### **My number is already in use with WhatsApp. Can I migrate it to Genesys Cloud?**

If the number is being used with the WhatsApp Messenger or WhatsApp Business App on iOS or Android, it can be migrated to Genesys Cloud. WhatsApp does not currently support migrating numbers from other Business Service Providers on the WhatsApp Business API. If your current number is already active, you must choose a new one. Note that this restriction applies to numbers activated throughout Genesys Cloud. Once your number is activated, you cannot migrate it to a different provider or move it back to an App. More information, see <https://developers.facebook.com/docs/whatsapp/guides/phone-number#migrate>

### **What types of phone numbers are supported by the WhatsApp Business API?**

You can use the WhatsApp Business API with international landlines and mobile numbers with country codes. The number must have an active Voice or SMS service for you to receive an activation code after adding it to Genesys Cloud. WhatsApp is a purely digital, internet-based channel. Once activated, all communication is done via the internet. Your WhatsApp number is more like an account ID, like your email address or username. Telephony and mobile services are separate from WhatsApp. The WhatsApp number can even be disconnected after activation if you do not receive calls or texts. However, you should retain ownership of the number to prevent someone else from using it.

### **Does WhatsApp Business API support toll-free numbers?**

Toll-free numbers are allowed as long as your country code is included. This is because numbers without country codes cannot be uniquely identified - the same number can be applied to two different countries. Toll-free numbers are also more complicated. Typically, it will not work if you call a toll-free number with the country code when you are inside the country. There is a possibility that customers in your country might try to dial what appears in the business contact (country code included), and they won't be able to connect with you. If this is a concern, let them know explicitly. Of special note, 0800 or 00800 are not recognized.

### **Why does my business need its own Facebook Business Manager (BM) in order to use WhatsApp?**

Facebook reviews each business that applies to use the WhatsApp Business API with a Business Service Provider like Genesys. The WhatsApp team may review your Facebook page or website and ask clarifying questions. WhatsApp Business Account (WABA) will have a 1:1 connection to your Business Account, and your business is responsible for complying with WhatsApp policies. Furthermore, WhatsApp prohibits partners, vendors, aggregators, and managed service parties from owning or subletting business accounts. You must use a Display Name of your number that is closely related to the name of your business or is associated with a brand, product, or trade name owned by you (documentation may be required for this).

Assume a service provider or advertising agency manages your Facebook page, ad campaigns, or other business functions under their BM. In that case, you can still create a WhatsApp account under your name. See Facebook page [Creating a Business Manager](#).

### **My phone number routes to main IVR. Do I need to re-route this to receive a WhatsApp activation call?**

If you add the WhatsApp integration to your Org and request a confirmation code, WhatsApp will call (or text) your number with the code. A live person must receive the call and receive the code. It is important to note that WhatsApp's automated service does not navigate IVR / DTMF menus. Instead, the bot will announce the code five (5) times when the call is answered and then disconnect. How you handle this depends on the IVR and operational needs of your business:

If your IVR or Genesys Cloud flow routes directly to a Queue, and an Agent is available to take the call immediately, you don't need to re-route the number. This works best if the IVR has no introductory message (or is very short). It is also best if the call is routed to a queue with a small number of Agents. If you use this method, make sure there is no wait time in the queue.

You can re-direct your number temporarily from an IVR to a direct number (for example, a cell phone) during inactive hours. This usually takes around 1 or 2 minutes.

When your IVR is high-volume and cannot be rerouted for business reasons, we can request a list of ANIs (originating numbers). The activation call will come from one of these numbers. You may configure an exception in your IVR flow to recognize these ANIs.

### **As a partner, vendor, managed service provider, BPO, or similar business, can I have a WhatsApp Business Account?**

Yes. Partners and similar businesses may create WhatsApp Business Accounts (WBAs) and activate numbers associated with and owned by your business. Valid use-cases include testing, demonstrations, and supporting your direct customers. (i.e., other businesses that purchase your services.) The WhatsApp numbers that your customer's customers use will not be yours, the end-users contacting those customers. Partners may offer consulting services related to configuration, integrations, and general operation of the channel. It is possible for service providers and BPOs to operate a WhatsApp channel for a customer, but the customer must own the WhatsApp number and be responsible for compliance with WhatsApp's policies. This is why each end-customer must have a verified Business Manager.

### **What does the 24 hour Customer Service window mean?**

To reduce junk messages to end-users, WhatsApp offers a 24-hour Customer Service window. If a user contacts your business, you can respond with any type of message in the next 24 hours. This type of message is free of charge. period resets. After 24 hours have passed since the last inbound message, only a template message may be sent. This is a paid notification. Genesys Cloud will

disable the Agent's text input after 24 hours elapse from the last inbound message indicating that only template messages are available if your contact center is closed for a weekend or holiday and more than 24 hours elapse before your Agents have a chance to answer.

### **What are Message Templates?**

In your WhatsApp Business Account, message templates are pre-configured messages. WhatsApp reviews and approves these templates, which must fit into certain categories, such as Account Update, Appointment Update, Issue Resolution, or Shipping Update. Advertising, marketing, and promotional messages, such as coupons or upselling, are not permitted in these templates. Generally, these templates must be customer-centric and high value, provided users with information they have requested. In Genesys Cloud, a common message template is Issue Resolution. This template is similar to: "We apologize we weren't able to answer your message right away. If you still need assistance, please reply with Yes." This template inspires the user to reply, which leads to another 24-hour Customer Service period. A window opens and Agents are free to converse freely with the user. Message Templates may have placeholder fields that will be filled dynamically, usually with the customer's name, account number, support case number, etc. See, [WhatsApp's guidelines on Template Messages](#).

### **How do I request a Message Template for my WhatsApp Business Account?**

Refer to the [Resource Center](#) for instructions and a downloadable form to request Message Templates. When approved, you will receive an email with instructions on configuring the Template in Genesys Cloud.

### **What are HSMs (Highly Structured Messages)?**

Refer to above question on Message Templates. WhatsApp refers to HSMs as [Template Messages](#).

### **Can I use automation or bots with the WhatsApp Business API?**

You may use automation when responding during the Customer Service Window, but must also have available prompt, clear, and direct escalation paths to human agents. For more details, see [WhatsApp Business Policy](#). Valid escalation paths include human Agent handoff in-thread, phone number, email, web support form, or prompting an in-store visit.

### **Can I change my Phone Number's Display Name?**

Yes, the display name change must be reviewed and approved by WhatsApp. When approved, a new integration certificate will be generated. You must delete your current WhatsApp integration and create a new one with the new certificate to complete the name change. We recommend doing this during off-peak hours and test-dialing or texting the number first to ensure you can receive the new activation code.

### **How can I update my Logo or other public Profile information?**

Email us at [GenesysCloudWhatsAppRequests@genesys.com](mailto:GenesysCloudWhatsAppRequests@genesys.com) for requests to change profile information. See the application above for the available fields.

### **What are Message Links (short links) and QR Codes?**

Once your number is active, you may request a Message Link and QR Code. These let end-users easily add your number to WhatsApp on their device without manually entering your number. Message Links can be included in mobile apps, email signatures, and websites, for example. QR Codes might be included on websites or printed and affixed to physical locations, advertisements, or products. Short links and QR Codes optionally have pre-populated messages that are filled when users tap, click, or scan it. For more details, see [details and the QR Code request form in our Resource Center](#).

### **What is a WhatsApp Official Business Account?**

A business account on WhatsApp can either be listed as an Official business account (OBA) or a regular Business account. An OBA will have a green badge for the business's profile. At this time, only certain business accounts are listed as an OBA. This is solely at Facebook's discretion. Listing a business as an "Official business account" is based on a variety of factors, such as whether the brand is notable. Generally, Facebook reserves Official Business accounts for internationally recognized brands. Being Verified on Facebook does not help your business to become an Official Business Account. Please see [How to Get and Official Business Account](#) for details, and contact us at [GenesysCloudWhatsAppRequests@genesys.com](mailto:GenesysCloudWhatsAppRequests@genesys.com) to request an OBA after your WhatsApp number is active.

### **Does the WhatsApp Business API support Group chat, Voice calls, or Video calls?**

The API does not support these features currently.

### **Does Facebook have access to WhatsApp messages? Is WhatsApp encrypted?**

As WhatsApp is an end-to-end encrypted channel, Facebook's documentation claims it does not have visibility into the text or media content of messages sent through WhatsApp Business API.

For information and statements about WhatsApp encryption see, <https://developers.facebook.com/docs/whatsapp/overview/>, [https://developers.facebook.com/docs/whatsapp/faq/#faq\\_188619461766385](https://developers.facebook.com/docs/whatsapp/faq/#faq_188619461766385), and <https://www.facebook.com/notes/mark-zuckerberg/a-privacy-focused-vision-for-social-networking/10156700570096634/>

### **Can I have multiple Business Managers or WhatsApp Business Accounts (WABAs)?**



According to Facebook's guidance, a business should have only one Facebook Business Manager. If your company has multiple entities, you can create additional BMs. For approval to use the WhatsApp Business API, each BM must go through Business Verification separately.

The use of multiple WABAs for a BM is also possible, but it's generally advised to have a limited number of WABAs, as this adds to management overhead. As an example, Message Templates are not shared among WABAs, so if they were to be used in every WABA, multiple WABAs would be required.

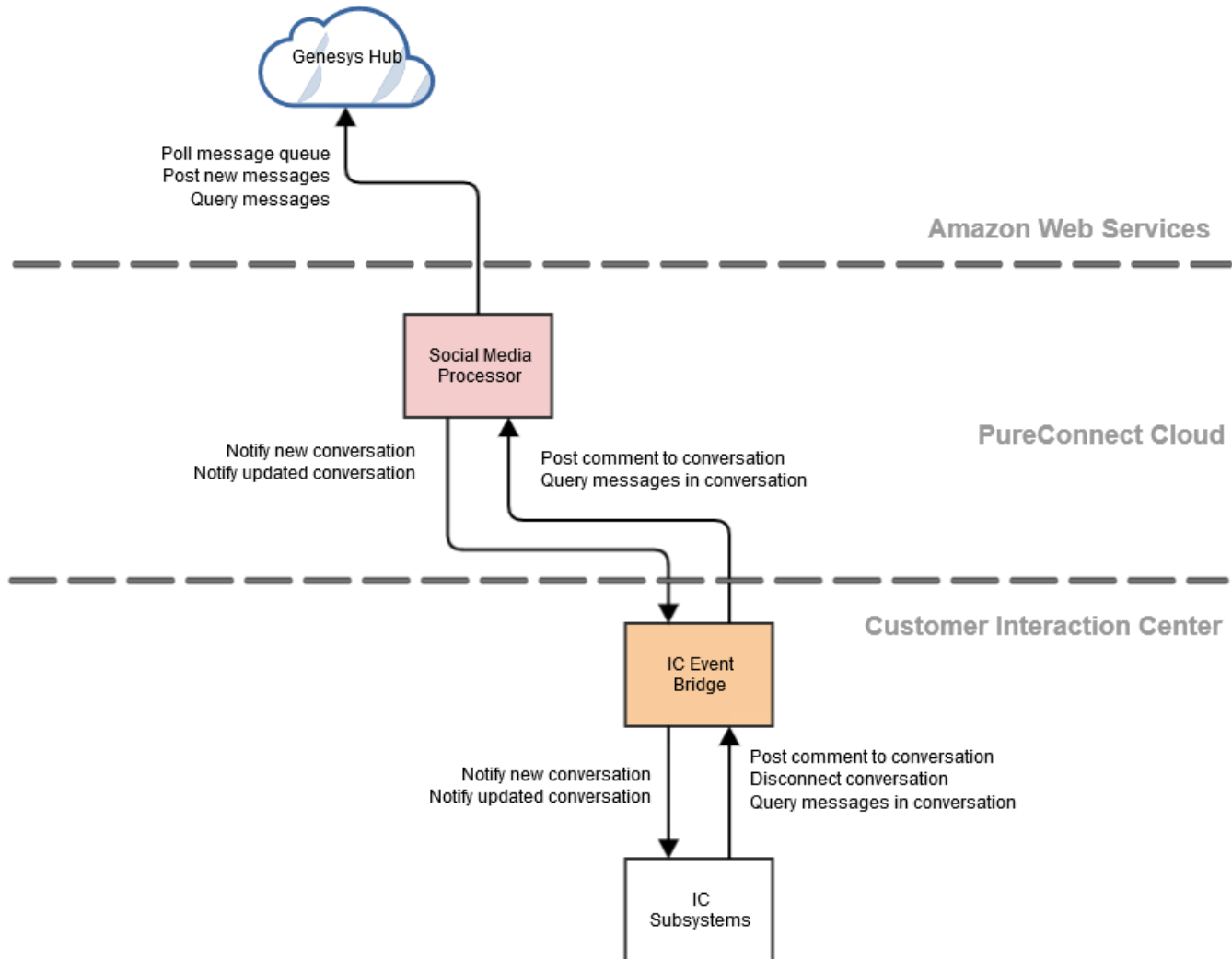
**What countries are blocked from using the WhatsApp Business API?**

The WhatsApp Business API is currently blocked from Crimea (+7978), Cuba (+53), Iran (+98), North Korea (+850), and Syria (+963). Businesses should not knowingly communicate with users in these countries regardless of the number's country code.

# Social Media Components -- Facebook and Twitter

The social media feature for Facebook and Twitter includes these components:

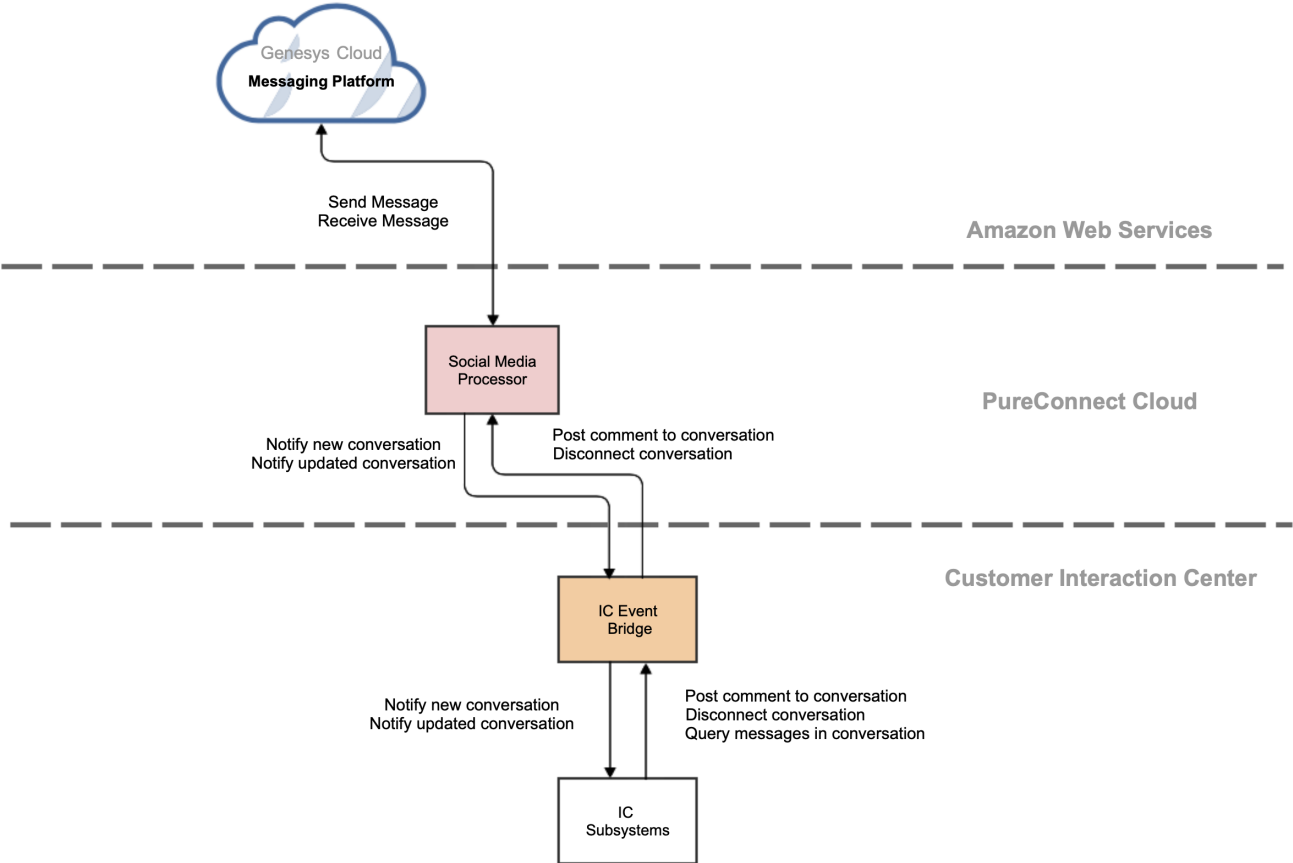
- The **Social Media Processor** processes and caches data for Customer Interaction Center.
- The **Genesys Hub** provides a platform-agnostic API for the social platforms that Genesys products support.
- The **CIC server** includes subsystems that work with the social media processor to process social 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.



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# Social Media Supported PureConnect Applications

The following PureConnect applications support social media applications.

Application	Description	For more information
Interaction Connect	<p>In the <b>Current Interaction</b> view in Interaction Connect, agents can receive and respond to social media interactions. Agents can pick up, hold, and disconnect social media interactions.</p> <p>Interaction Connect also provides agents with access to their quality management scorecards and interaction recordings for social media interactions.</p> <p>Interaction Connect is also where administrators configure social media channels.</p>	Interaction Connect help
Interaction Tracker	Administrators and supervisors can search for social media interactions and view the details in the <b>Interaction Details</b> 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](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](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](#)).

**Social Media Technical Reference**

## 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

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

ACD WhatsApp

Enables or disables the agent's availability to receive WhatsApp interactions, if configured.

### Interaction Administrator > User Configuration > Licensing

The screenshot shows the 'User Configuration - Licensing' window. Under the 'Additional Licenses' section, the following licenses are checked:

- Interaction Analyzer Access
- Interaction Client Mobile Edition
- Interaction Client Operator Add-On
- Interaction Client Outlook Add-In
- Interaction Data Extractor
- Interaction Dialer Add-On
- Interaction Feedback Access
- Interaction Optimizer Access Real-time Adherence
- Interaction Optimizer Client Access
- Interaction Optimizer Real-time Adherence Tracking
- Interaction Optimizer Schedulable
- Interaction Quality Manager
- Interaction Quality Monitoring Agent
- Interaction Recorder Access
- Interaction Recorder Client Access
- Interaction Recorder Extreme Query
- Interaction Scripter
- Interaction Supervisor iPad Edition
- Interaction Supervisor Plug-In: Historical Reporting

In the 'Interaction Types' section, 'ACD Social Media' and 'ACD WhatsApp' are checked and highlighted with a red box. Other options include 'Direct Routed Work Items', 'Group Routed Work Items', 'Process Monitor', 'Process Designer', 'Analytics License', 'Core', 'Designer', 'Enterprise', and 'Enable Licenses'.

ACD Utilization rate

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

### Interaction Administrator > User Configuration > ACD

The screenshot shows the 'ACD Utilization' configuration window. The table below lists the utilization settings for various interaction types:

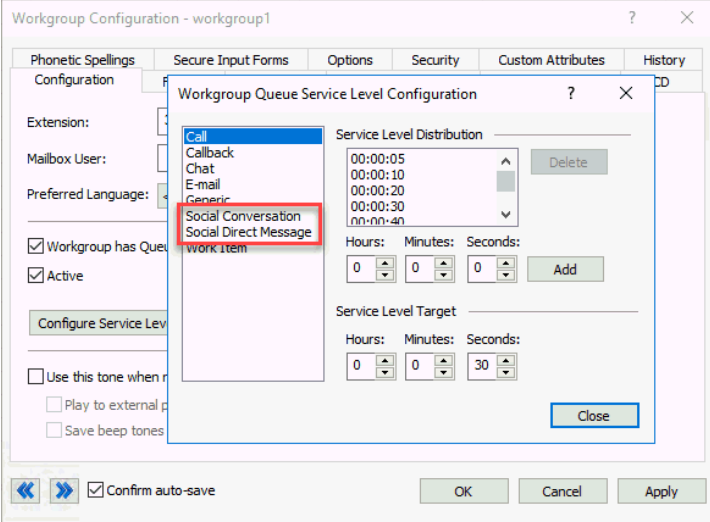
Interaction Type	% Utilization	Max. Assign.	Inherited
Call	100 %	1	workgroup1
Callback	100 %	1	workgroup1
Chat	100 %	1	workgroup1
E-mail	100 %	1	workgroup1
Generic	100 %	1	workgroup1
Social Conversation	100 %	1	workgroup1
Social Direct Message	100 %	1	workgroup1
Work Item	100 %	1	workgroup1

The 'Social Conversation' and 'Social Direct Message' rows are highlighted with a red box. Below the table are 'Add', 'Edit', and 'Delete' buttons.

For more information, see the following:

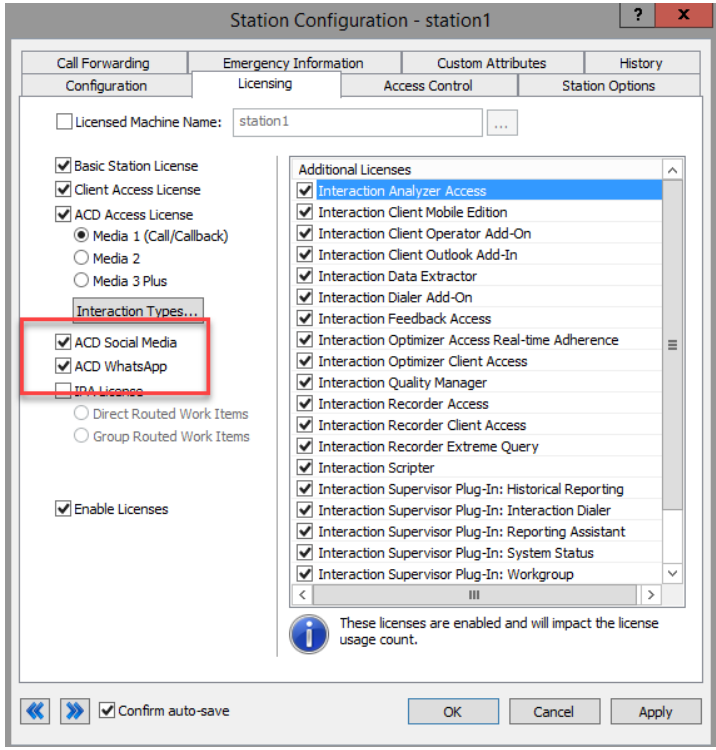
- "Utilization - Workgroup, User" in the *Interaction Administrator Help* at [https://help.genesys.com/cic/mergedProjects/wh\\_ia/desktop/interaction\\_administrator\\_help.htm](https://help.genesys.com/cic/mergedProjects/wh_ia/desktop/interaction_administrator_help.htm)
- ACD Processing Technical Reference* at [https://help.genesys.com/cic/mergedProjects/wh\\_tr/desktop/pdfs/acd\\_processing\\_TR.pdf](https://help.genesys.com/cic/mergedProjects/wh_tr/desktop/pdfs/acd_processing_TR.pdf)



<p>Workgroup Queue Service Level</p>	<p>Specifies the target service level (amount of time) for handling social media conversations.</p>	<p><b>Interaction Administrator &gt; Workgroup Configuration &gt; Configuration</b></p> 
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### Station Configuration

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

<p>ACD Social Media option</p>	<p>Enables or disables routing of Facebook and Twitter social media interactions to an agent connected to the station.</p>	<p><b>Interaction Administrator &gt; Station Configuration &gt; Licensing</b></p> 
<p>ACD WhatsApp option</p>	<p>Enables or disables routing of WhatsApp interactions to an agent on the station.</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, 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.

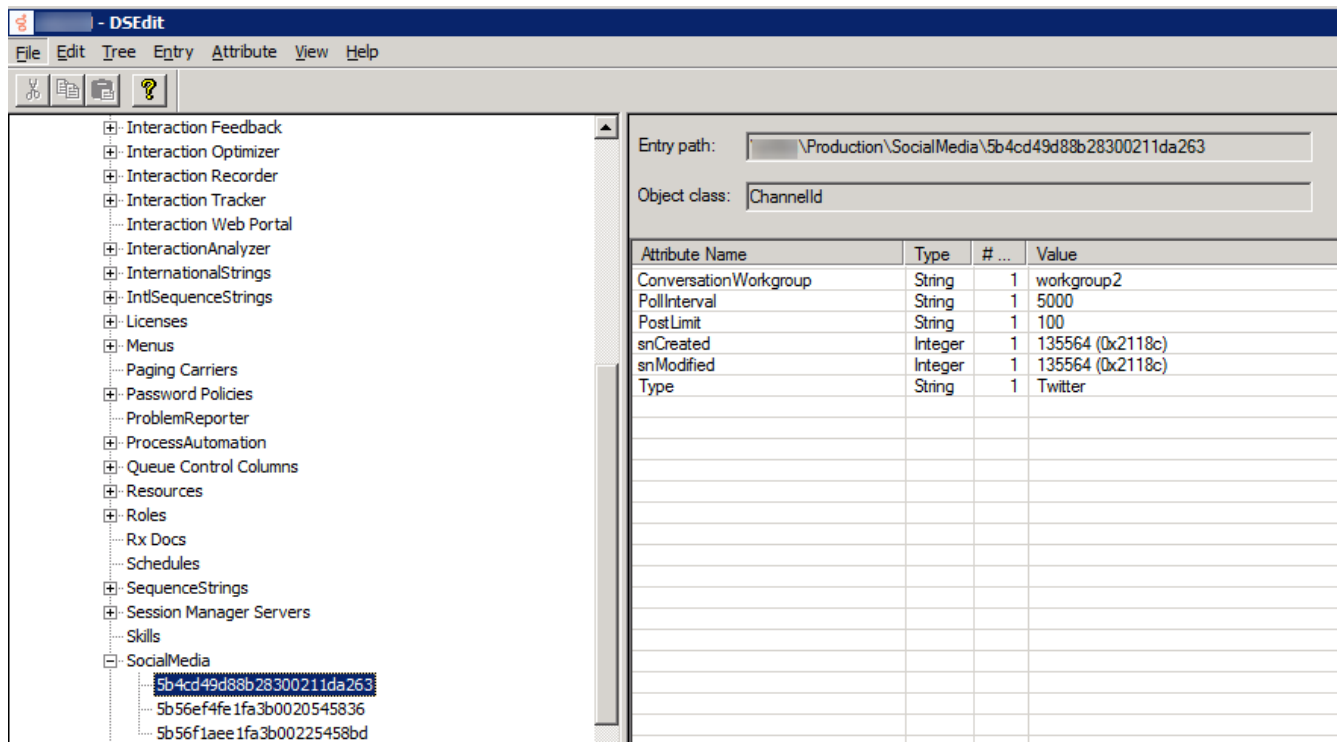
You can add and configure channels in Interaction Connect, as long as you have the **Social Media Admin** right.

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.



The screenshot shows the DSEdit application window. The left pane displays a tree view of system objects, with 'SocialMedia' expanded to show three entries: '5b4cd49d88b28300211da263', '5b56ef4fe1fa3b0020545836', and '5b56f1aee1fa3b00225458bd'. The right pane shows the configuration for the selected entry. 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

# 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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