Journey JavaScript SDK

Map traits to link customer records

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Contents

Learn how to map multiple records for the same customer to see more complete customer profiles in Live Now.

> ## Important
> This article only applies to customers using web chat. If you are a Genesys Cloud CX customer, we encourage you to use the new web messaging feature to replace web chat.

About traits mapping

Traits are properties, such as a customer's email address or phone number. Genesys Predictive Engagement gathers customer traits every time a customer visits a website that you track with the Genesys Predictive Engagement tracking snippet. It's possible to have multiple customer records for the same person. For example, when a customer visits your website multiple times and uses a different browser each time. Because Genesys Predictive Engagement creates a separate record for each instance, the separate customer records may contain only a subset of all the available customer traits. You can map the traits that the separate customer records contain to link the records. Then, you can see the complete customer information in Live Now.

> ## Important
> When the traits mapper links customer records, it preserves the separate customer records. It doesn't consolidate them into a single customer record. Instead, the traits mapper updates all linked customer records with the current traits information.

After linking customer records, the traits mapper updates all the records when new trait information becomes available. It overwrites existing or duplicate traits with the most current trait information.

View mapped traits in the user interface

After you map traits, they appear here:

- Genesys Cloud CX > Admin menu > Live Now > Customer summary (admin view)
- Agent user interface > Journey gadget >
    - Visitor information (Genesys Multicloud CX)
    - Visitor information (PureConnect)

Map traits globally

To start mapping traits, define a global traits mapper when you deploy the Genesys Predictive Engagement tracking snippet on your website. Specifically, when you call init to initialize the Journey JavaScript SDK, identify which attributes to treat as traits. See the following code example.

For more information, see Methods that track events and Mappable traits.

When Genesys Predictive Engagement gathers values for these attributes, they map as traits.

You can also map traits based on specific events.

Example

Map traits for a specific event

You can map specific traits locally instead of globally for specific events. For more information, see

Methods that track events and Mappable traits.

The complete set of map traits for a customer is the union of globally and locally mapped traits. For example, suppose you map the email address field using the global traits mapper, but on one page you ask for the customer's phone number. Both the email address and the phone number map to the customer and both appear in the customer's Live Now profile.

If Genesys Predictive Engagement captures the same data in two places, the most recent trait mapped appears in Live Now. Previous values for mapped traits are not preserved.

Examples of mapped traits

The following examples show how to map attributes as traits. Specifically:

- The attributes, "email" and "emailAddress" map to the trait "email."

Attributes	traitsMapper	Traits

{
 	
   "email": "firstname.lastname@somemail.com",
 	
   "comment": "This is great",
 	
   "section": "support"
 	
}
	[
	
	  {"fieldName": "email"},
	
	]
		{
		
		   "email": firstname.lastname@somemail.com",
		
		}

{
 	
   "emailAddress": "firstname.lastname@somemail.com",
 	
   "comment": "This is great",
 	
   "section": "support"
 	
}
	[
	
	  {
	
	   "fieldName": "emailAddress",
	
	    "traitName": "email"
	
	  }
	
	]
		{
		
		   "email": firstname.lastname@somemail.com",
		
		}

Methods that track events

Traits mapping can occur whenever there is a tracked event on your website. Specifically, Genesys Predictive Engagement tracks events when you use the following methods:

- init
- pageview
- record
- forms:track

Mappable traits

ID traits

Trait	Example
email	JTS1715@gmail.com

Phone traits

Trait	Example
homePhone	3179871234
cellPhone	3179871235
otherPhone	3179712356
workPhone	8179874321

Name traits

Trait	Example
salutation	Mr.
jobTitle	Manager
givenName	John
middleName	Thomas
familyName	Smith