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Journey JavaScript SDK

Map traits to link customer records

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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

The screenshot displays the 'Live Now' interface for a customer summary. On the left is a sidebar with navigation options: Segments, Outcomes, Action Maps, Web Tracking, Smart Tags, Tracking Snippet, Visitor Activity Report, and Action Map Report. The main content area is titled 'Visitors > Live now > Customer summary'. It shows the visitor's name as 'Juan Shirley', status as 'Online now' (highlighted with a red arrow), and page views as 9. Below this is a list of contact details: Company (DuoTones), Birthdate (09062000), Mobile (+13175261232), Home (+13175261210), Email (jdshirman@gmail.com), and Facebook ID (JTSMan1715). Further down, 'Additional details' include location (Brownsburg, Indiana), device (Apple desktop), operating system (Mac OS X 10.14.6), and browser (Chrome 77.0.3865.75). The 'Sessions' section shows a session on September 18, 2019, at 9:50 AM, with a duration of a minute. The 'Visit journey' section features a diagram showing a path through 'Home Page', 'Life Insurance', 'Payment', 'Business Insurance', and 'Home Insurance'. The 'Searches performed' section indicates 'No searches performed'. The 'Segments assigned' section shows 'Mac User Segment'. The 'Outcome scores' section displays three progress bars for 'Quote requested', 'Make Claim', and 'Quote requested-COPY-COPY-COPY'.

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

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