



# Digital Channels Administrator's Guide

10/31/2020

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**Related pages:**

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Article	Description
Article	Description

"> Integrate with Genesys Hub Genesys Hub is our centralized platform that connects to Twitter, Facebook and WhatsApp. Set up an account with Genesys Hub and enable channels and services.

# Set up Facebook and Twitter



- Administrator

Learn how to integrate Facebook and Twitter into Agent Desktop.

## Related pages:

- 

Genesys Social Engagement enables you to receive and send messages, posts, comments, likes, tweets, and retweets on the world's top two social engagement platforms, Facebook and Twitter.

After you complete the steps on this page, you can treat social media communications like any other Genesys interaction. For example, you can route tweets with keywords to the best-skilled agent using a Designer application. Reporting is also available through Genesys CX Insights.

## Configure channels in Genesys Hub

Set up connections to Facebook and Twitter in Genesys Hub.

- Contact your Genesys representative to access Genesys Hub.
- Integrate with Genesys Hub

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## Enable Digital Shared Services

Enable service channels in Agent setup to connect to the channels you created in Genesys Hub. Later when you create a Designer application to route social media interactions, it will pull the data from these channels.

- Contact your Genesys representative to create service channels.
-

## Configure Agent Desktop

Go through the normal process to configure any necessary desktop options for the agents in your contact center, in particular for Facebook and Twitter.

- Agent Setup documentation
  - Facebook
  - Twitter
- 

## Create a Designer application

Create a Designer application to route social media interactions to the right agents. **Note:** You should see the service channel you created listed under **Manage Digital Endpoint** in Designer.

- Create a Designer application
- 

## Related documentation

See how users handle social media interactions in Agent Desktop.

- Facebook
  - Twitter
-

# Set up WhatsApp



- Administrator

Learn how to integrate WhatsApp into Agent Desktop.

## Related pages:

- 

Genesys Digital Channels enables you to integrate WhatsApp into Agent Desktop. The WhatsApp messaging service enables the exchange of text messages, emojis, images, and Highly Structured Messages (HSM) between your agents and customers.

After you complete the steps on this page, you can treat WhatsApp communications like any other Genesys interaction. For example, you can route messages to the best-skilled agent using a Designer application. Reporting is also available through Genesys CX Insights.

## Configure channels in Genesys Hub

Set up connections to WhatsApp in Genesys Hub.

- Contact your Genesys representative to access Genesys Hub.
- Integrate with Genesys Hub

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## Enable Digital Shared Services

Enable service channels in Agent setup to connect to the channels you created in Genesys Hub. Later when you create a Designer application to route social media interactions, it will pull the data from these channels.

- Contact your Genesys representative to create service channels.
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## Configure Agent Desktop

Go through the normal process to configure any necessary desktop options for the agents in your contact center, in particular for chat.

- Agent Setup documentation
  - Chat
- 

## Create a Designer application

Create a Designer application to route WhatsApp interactions to the right agents. **Note:** You should see the service channel you created listed under **Manage Digital Endpoint** in Designer.

- Create a Designer application
- 

## Related documentation

See how users handle WhatsApp interactions in Agent Desktop.

- WhatsApp
-

# Integrate with Genesys Hub

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- Administrator

Genesys Hub is our centralized platform that connects to Twitter, Facebook and WhatsApp. Set up an account with Genesys Hub and enable channels and services.

**Related pages:**

- 

Complete the steps below to set up an account with Genesys Hub and enable channels and services, then return to Set up Facebook and Twitter or Set up WhatsApp to finish the rest of the setup.

**Important**

Contact your Genesys representative to get access to Genesys Hub.

## Set up your account



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### Setup your Social Engagement Software

First Name	<input type="text" value="First Name"/>	Last Name	<input type="text" value="Last Name"/>
Company/Org. Name	<input type="text" value="Name of company or org. that has purchased this software"/>		
Email Address	<input type="text" value="Corporate email address is required."/>		

[Continue](#)

Go to <https://socialanalytics.genesyscloud.com/gse/signup> and complete the form.

You should receive a confirmation email titled "Confirmation required for Genesys Social Engagement deployment" (don't forget to check your spam folder). Follow the steps in the email and login to Genesys Hub.

**Note:** You can always use <https://socialanalytics.genesyscloud.com> to access Hub. If you prefer a static URL, you can use <https://static.socialanalytics.genesyscloud.com> instead.

## Set up Twitter: Create a Twitter account channel

The image shows a screenshot of the Genesys HUB interface. On the left is a navigation sidebar with 'CHANNELS' (My Channels) and 'ACCOUNT' (My Account, Users, Groups, My Profile) sections. The main area is titled 'New Channel' and contains a form with the following fields:

- Channel Type \***: A dropdown menu with the text '-- choose a channel type --'.
- Channel Name \***: A text input field with a validation message: 'Channel name must be at least 2 characters long'.
- Description**: A text area with a placeholder: 'Short description to better identify the channel'.

Below the form is a blue 'Create' button. To the left of the 'Create' button is a 'Login to Twitter' button. An arrow points from the 'Login to Twitter' button to a browser window showing a Twitter authorization dialog. The dialog title is 'Twitter / Authorize an application' and the URL is 'https://api.twitter.com/oauth/aut'. The main text of the dialog asks: 'Authorize Genesys Social Engagement. to use your account?'. Below this, it shows the Genesys Social Engagement logo and website URL 'www.genesys.com'. There are input fields for 'Username or email' and 'Password', a 'Remember me' checkbox, and a link for 'Forgot password?'. At the bottom are 'Authorize app' and 'Cancel' buttons.

Create a Twitter account channel to authenticate with Twitter using your organization's Twitter handle (login) and password.

Under **My Channels** in the left navigation menu, click **+Add Channel**.

- Choose *Twitter:Account* for the **Channel Type**.
- Set the **Channel Name** to - *Twitter Account*. Example: *@Genesys - Twitter Account*.
- Add an optional description of how you will use the channel.

Save your channel and click **Login to Twitter**.

Enter the Twitter credentials for your organization: username (handle) or email, and the password associated with your Twitter account. **Important:** Also check **Remember me**.

If you have successfully authenticated, you will see the following message: **Access\_token successfully saved**.

## Set up Twitter: Create a Twitter service channel

The screenshot shows a 'New Channel' form with the following fields and values:

- Channel Type \***: A dropdown menu with 'Twitter : Service' selected.
- Channel Name \***: A text input field containing '@Genesys - Twitter Service'.
- Description**: A text area containing 'This channel monitors Twitter mentions around the the @Genesys handle'.
- Languages \***: A multi-select field with 'x English' and 'x Spanish' selected.
- Keywords \***: A text input field containing 'x @Genesys'.
- Advanced**: A section header with a right-pointing arrow.
- Skip Retweets**: A toggle switch with 'Yes' selected (highlighted in blue) and 'No' unselected.
- Twitter Handle(s) \***: A text input field containing '@Genesys'.

Create a Twitter service channel to listen for mentions of your keyword(s) on Twitter.

Under **My Channels** in the left navigation menu, click **+Add Channel**.

- Choose *Twitter:Service* for the **Channel Type**.

- Set the **Channel Name** to `- Twitter Service`. Example: `@Genesys - Twitter Service`.
- Add an optional description of how you will use the channel.

### Best practices for managing keywords in Twitter service channels

When setting up a `Twitter:Service` channel, you can add any text in the **Keyword** field. For example, if we set up a channel to monitor mentions of Genesys on Twitter, some appropriate keywords might be `@Genesys`, `#Genesys` and `Genesys software`.

Make sure to use keywords that are specific to your business or use case and not too broad or ambiguous. You can check this using Twitter's search functionality at <https://twitter.com/search-home>. Enter each keyword, one at a time, and assess the search results. For example, if your company is called "United Ultra Local Bank Inc.", you might want to use the keyword `#United`. This would be a mistake, as it would return a flood of posts related to topics as broad as `#United Nations`, `#United States`, `Manchester #United`, and so on. Even worse would be `#Check`, `savings account`, `#balance`, or `overdraft` as these are even more generic.

Ambiguous keywords can clutter your inbound feed and, in extreme cases, Twitter might cut off access to data if the volumes are too high. If a channel's inbound traffic exceeds 300 tweets per minute for a certain keyword, Genesys Hub automatically removes the keyword from the channel to keep data volumes from exceeding Twitter's thresholds. After three days, Hub unblocks the keyword and you can add it back to your channel. If you need to add the keyword before the three days are up, contact your Genesys representative.

After you re-add the keyword, you can run a recovery task to get the data that was not monitored while the keyword was blocked. **Note:** Hub will not re-block the keyword while data recovery is running.

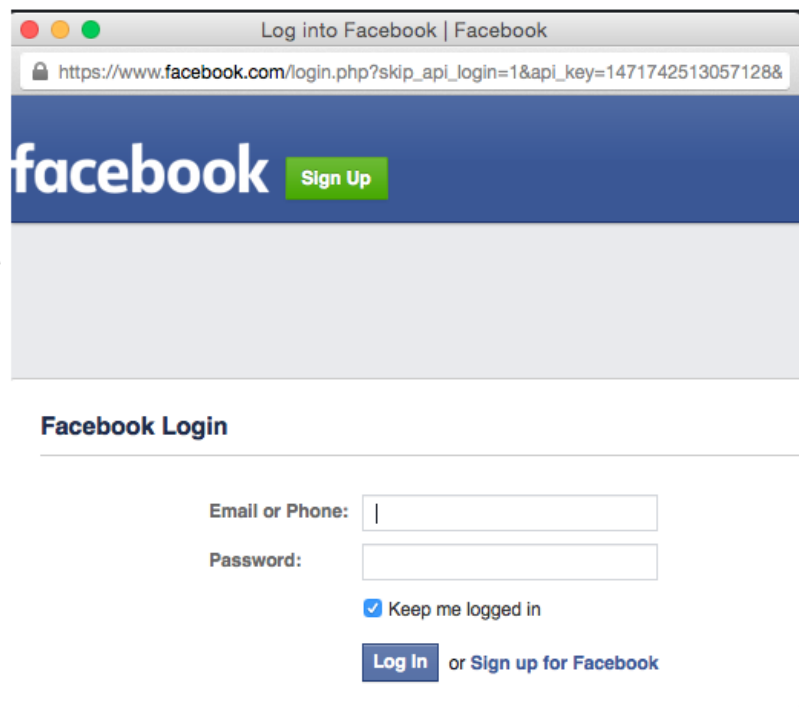
## Set up Facebook: Create a Facebook account channel

### Update Channel

Account	SteveO-Test
Channel Type *	Facebook
Channel Name *	Genesys - Facebook Account
Channel ID	5696a84d0f6c137a8080e16d
Description	Source data regarding the Facebook pages managed by Genesys

Authorise Social account

 Login to Facebook



Create a Facebook account channel to authenticate with Facebook using your organization's Facebook administrator login credentials. These user credentials must have admin access to all the pages you want to associate with this channel. For simplicity, make sure you are logged into Facebook with the same browser you're using for this setup.

Under **My Channels** in the left navigation menu, click **+Add Channel**.

- Choose *Facebook:Account* for the **Channel Type**.
- Set the **Channel Name** to - Facebook Account. **Example:** Genesys - Facebook Account.
- Add an optional description of how you will use the channel.

After saving your channel, the application displays an extended view where you can **Login to Facebook**.


Use the Facebook admin credentials for your organization. **Important:** Also check **Keep me logged in**.

If you have successfully authenticated, you will see the following message: **access\_token successfully saved, close window**.

## Set up Facebook: Create a Facebook service channel

### Update Channel

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<b>Account</b>	SteveO-Test
<b>Channel Type *</b>	Facebook
<b>Channel Name *</b>	'Genesys - Facebook Service'
<b>Channel ID</b>	56981c750f6c131a22914ad9
<b>Description</b>	Listen for posts on all Genesys Pages
<b>Facebook Pages</b>	Select pages to track
<b>Queue history window</b>	604800 
<b>Data Recovery</b>	<input type="checkbox"/>

[Update & proceed →](#)

Create a Facebook service channel to listen for posts, comments and messages on Facebook. Under **My Channels** in the left navigation menu, click **+Add Channel**.



- Choose *Facebook:Service* for the **Channel Type**.
- Set the **Channel Name** to - *Facebook Service*. Example: *Genesys - Facebook Service*.
- Add an optional description of how you will use the channel.

After saving your channel, the application displays an extended view where you can configure additional settings:

- Choose the pages you want to monitor from the list under **Facebook Pages**. This list is made up of all the pages your login account can administer.

## Set up WhatsApp: Create a WhatsApp service channel

[←](#) Update "WhatsApp Doc" Channel

Channel Type *	WhatsApp
Channel Name *	WhatsApp Doc
Production mode	<input type="checkbox"/>
Channel status	<input checked="" type="checkbox"/> Active
Channel ID	5c9b1e725aa1e90021e257b2 
Description	Doc channel for WhatsApp
Platform	PureEngage Premise
Business Phone Number *	 +1 <input type="text"/>
Current Stage	CREATED

Update

Initiate

Create a WhatsApp service channel to communicate with your customers.

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Under **My Channels** in the left navigation menu, click **+Add Channel**.

- Choose *WhatsApp: Service* for the **Channel Type**.
- Choose *Genesys Engage cloud* for the **Platform**.
- Enter your business phone number. **Note:** If you want to create more than one WhatsApp channel, you must use a unique phone number for each channel.
- Enter a channel name. This is used as the phone display name in WhatsApp and is visible to consumers interacting with the brand in WhatsApp Messenger. You must ensure that the name complies with WhatsApp policies: <https://developers.facebook.com/docs/whatsapp/guides/vname>.
- Add an optional description of how you will use the channel.

After you create the channel, it goes through the following stages in the activation process:

1. **CREATED** - The first stage after channel creation.
2. **INITIATED** - The channel is under review by Genesys.
3. **VERIFIED** - The channel information was reviewed and is correct.
4. **REGISTERED** or **REJECTED** - The channel can be registered or rejected by the Genesys team based on the provided channel data.
5. **ACTIVATED** - The channel is activated and is enabled for WhatsApp Business.

## Set up WhatsApp: Register a WhatsApp service channel

Register your channel by sending a request to Genesys. The Genesys team verifies, provisions and configures all the required infrastructure for your business contact number to function and service your consumers. **Note:** After registering, you must contact your Genesys representative if you want to change your business phone number or channel name.

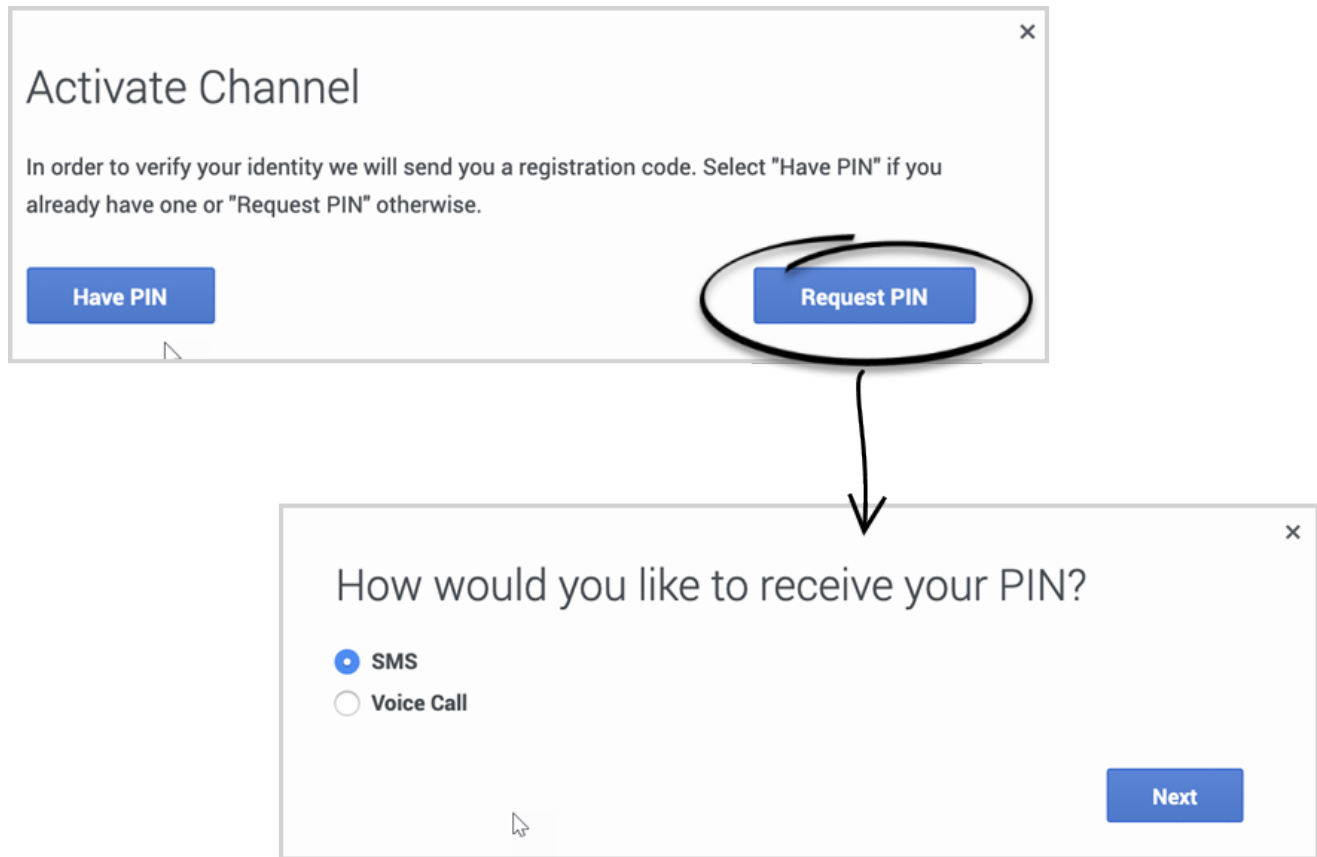
Under **My Channels** in the left navigation menu, edit the WhatsApp service channel you created previously and click **Initiate** to send a review request to Genesys. Your channel is now in the **INITIATED** stage. You may be contacted by your Genesys representative to verify your WhatsApp channel, so make sure that all email addresses for the users registered in your account are valid. Once the initial validity has been checked, Genesys will set the channel state to **VERIFIED**.

After Genesys completes the full review, you'll receive an email indicating whether your request was approved. Your channel will now have one of the following states:

- **REGISTERED** - You can now activate the WhatsApp service channel.
- **REJECTED** - Contact your Genesys Representative for details about why your channel was rejected.



## Set up WhatsApp: Activate a WhatsApp service channel



Activate your WhatsApp channel once you receive a registration confirmation email from Genesys.

Under **My Channels** in the left navigation menu, edit the WhatsApp service channel you created previously and click **Activate**. Now, click **Request PIN** and choose your contact method. Enter your PIN in the form and click **Activate**.

## Create an administrator user for the account

The screenshot shows the Genesys Hub interface. The top navigation bar includes 'Genesys HUB', 'My Channels', 'System Status', and 'Jobs'. The left sidebar has sections for 'CHANNELS' (My Channels), 'ACCOUNT' (My Account, Users, Groups, My Profile), and 'Users' is highlighted. The main content area is titled 'New User' and contains the following form fields:

- First name \***: Text input field with placeholder 'First name'.
- Last name \***: Text input field with placeholder 'Last name'.
- Email \***: Text input field with placeholder 'Only one email per account allowed'.
- Roles \***: Dropdown menu with 'ADMIN' selected.
- Groups**: Dropdown menu with 'FB\_ACC Review Team' selected.

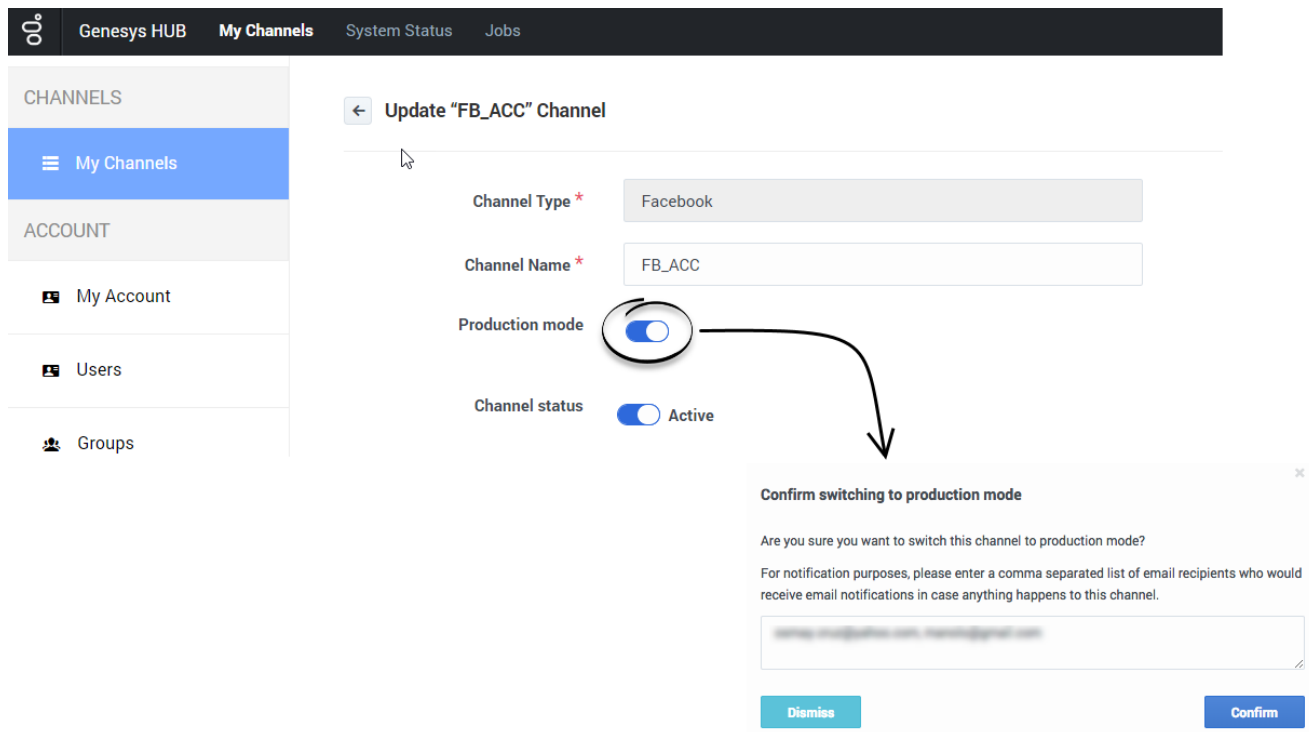
At the bottom of the form are two buttons: 'Create' (blue) and 'Discard changes' (orange).

Create an administrator user account in Genesys Hub. Under **Users** in the left navigation menu, click **+Add User**.

- For **First Name**, use your company's name followed by a 1; for example, `Genesys1`. For **Last Name** field, type `admin`.
- In the **Email** field, type an email address using a format like the following:  
`Genesys1_Admin@GenSocialEngage.com`.
- Make sure to choose **Admin** for the role.

After you create this user, return to the **Users** menu. You should see a list of the users associated with the account that you have set up. Lastly, reset the password for the administrator user to finish the setup.

## Production toggle



You can toggle between production and non-production (lab, staging, test) modes for using a switch on each channel.

Under **My Channels** in the left navigation menu, edit a channel and slide the toggle to the right to engage **Production mode**. On the confirmation window, add any email address that should receive notifications for the channel. This creates a distribution list in the Hub Status page.

Note the following:

- Internal Service Level Agreements (SLAs) apply only to accounts in production mode.
- Genesys carries out recovery, or assists with it, for production accounts only.
- Production mode is indicated in reports.
- Production mode requires all required licenses to be in place.

# Set up SMS



- Administrator

Learn how to integrate Short Message Service (SMS) into Agent Desktop.

## Related pages:

- 

Genesys Digital Channels enables you to integrate Short Message Service (SMS) into Agent Desktop so that agents can exchange text messages with customers.

After you complete the steps on this page, you can treat SMS communications like any other Genesys interaction. For example, you can messages to the best-skilled agent using a Designer application. Reporting is also available through Genesys CX Insights.

## Configure an SMS number

Set up your SMS number in Genesys SMS Aggregator.

- Contact your Genesys representative to set up your SMS number.

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## Enable Digital Shared Services

Enable service channels in Agent Setup. Later when you create a Designer application to route social media interactions, it will pull the data from these channels.

- Contact your Genesys representative to create service channels.
-

## Configure Agent Desktop

Go through the normal process to configure any necessary desktop options for the agents in your contact center, in particular for chat.

- Agent Setup documentation
  - Chat
- 

## Create a Designer application

Create a Designer application Create a Designer application to route SMS interactions to the right agents.

**Note:** You should see the service channel you created listed under **Manage Digital Endpoint** in Designer.

- Create a Designer application
- 

## Related documentation

See how users handle SMS interactions in Agent Desktop.

- SMS Chat
-