Digital Channels Administrator's Guide

2/23/2026

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Related documentation

Learn about how email works in Genesys Multicloud CX.

- How email works

Getting started with Advanced Chat

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-

Learn about the features and configuration of Genesys Advanced Chat, such as: asynchronous chat, last agent routing, and chatbot strategies in Designer. This document also lists some real-time and historical reports available for Advanced Chat.

Related documentation:
-

> ## Important
> The term "Nexus" is used in some places in this article. It is the simplified name used for the Digital Channels application and nodes.

Prerequisites and feature comparison

The following components are required to implement Advanced Chat:

- Agent Setup or Digital Channels Private Edition Guide
- Workspace Web Edition 9.0 Agent Workspace
- Widgets 9.0
- Genesys Engagement Services (GES) Push Notifications for mobile app support
- Genesys Web Services (GWS) 9.0
- Designer 9.0

Asynchronous Chat

Asynchronous (async) Chat is the latest evolution in web chat.

> **a·syn·chro·nous**: not happening at the same time; not simultaneous; not concurrent.

Async chat breaks down the barriers between the contact and the contact center. It allows for long running conversations (called sessions). It grants the ability to send messages and receive replies anytime and anywhere. Async Chat is a feature of Advanced Chat. It keeps chats open after the last agent leaves the session. An agent can rejoin the session until the session is marked as **Done**.

The following are some of the key features provided by Advanced Chat:

- Integration with chatbots

- Image and emoji support

- Agent starting an outbound message

- API for Chat Widget customization (web or mobile channel)

- Integration of other digital channels including SMS, Social Media, and Messaging

The following channels support the advanced chat asynchronous interaction mode:

- Chat

- Facebook

- Twitter

- WhatsApp

- SMS

- CX Contact

- Chatbots and voicebots

- Secure Email

Important

If asynchronous chat is not enabled at the Chat Widgets level, then Agent Workspace has the following behavior:

- A new session is created each time a contact or agent starts an interaction.

- The agent history does not display the previous conversations in the chat interaction view.

To enable asynchronous chat for Widgets, check **Enable Async WebChat** in the Widget configuration. Refer to the **Configuration** section in this article for configuration information.

Typical Use Case for Asynchronous Chat

The following scenario demonstrates how asynchronous chat works:

Summary: A contact requests a chat session with an agent from an organization's web or mobile channel. The request is routed to the best available agent, depending on the URL (Page Title) and the Agent Skill. The chat session is asynchronous by default and long-lived.

1. A contact of an airline uses chat (web or mobile channel) to request a boarding pass.

2. An agent accepts the chat interaction in Agent Workspace. The chat is displayed in the **Conversation** tab.

3. The contact asks for flight check-in help.

4. The agent requests the flight booking number from the contact. Unfortunately, the contact cannot find the booking number right away so they leave the chat to look for it.

5. The agent marks the interaction as **Done**.

> ### Tip
> Agent Workspace enables the agent to be subscribed to the contact, so the agent can access the contact anytime using the **Communication** tab.

6. The contact resumes the chat to share the booking number with the agent. Since the contact center uses the **Last Agent Routing** strategy, the Designer application is not used until the *asynchold queue* timeout expires; therefore, the agent who originally handled the interaction receives a chat notification (pop-up notification) for 30 seconds.

> ### Tip
> For information about how to configure the *asynchold queue* timeout, refer to the **Configuration** table.

7. The agent accepts the chat and resumes the conversation using the **Conversation** tab.

8. The agent requires more time to complete the check-in for the contact; however, the contact asks the agent to share the details after completing check-in and leaves the chat.

9. The agent marks the interaction as **Done**.

10. After the contact completes the check-in, the agent resumes the interaction from the **Communication** tab, sharing the boarding pass with the contact using the **write a message** field.

> ### Tip
> This interaction is not counted toward the active number of cases that the agent is currently handling.

11. The agent sets their status to **Not Ready**.

12. The contact returns to the chat to view the boarding pass and thanks the agent.

13. The agent receives a notification from the contact and replies using the **write a message** field in the **Communication** tab.

Asynchronous Chat on-premises versus in the cloud

If you have previously used asynchronous chat in an on-premises environment, such as Genesys Chat Server, you will find that there are some differences in the way asynchronous chat behaves in the Digital Channels cloud environment.

For example, Chat Server on-premises keeps interaction active only for the duration of the

interaction; however, Digital Channels adds the session concept: individual interactions start and end as usual, but interactions with a contact are associated into a session to keep the conversation going. The session model is simpler and more flexible.

Here are some benefits of Digital Channels asynchronous chat over the old on-premises asynchronous chat:

- There is no longer a need to put chat interactions on hold to continue a conversation.

- Interactions can be close or started without affecting the session with the contact.

- Interactions no longer time out.

- There is no need to wake up a session because sessions are not held.

- It is not necessary to add async reports to GCXI to manage long duration interactions.

- The **Conversation** tab provides a session transcript which allows agents to access previous interactions with a contact.

- The **Communication** tab provides access to past interactions and enables agents to message contacts without an active interaction.

- Agents are alerted about new messages from contacts that the agent has worked with. If the agent does not respond, the interaction is routed through Designer.
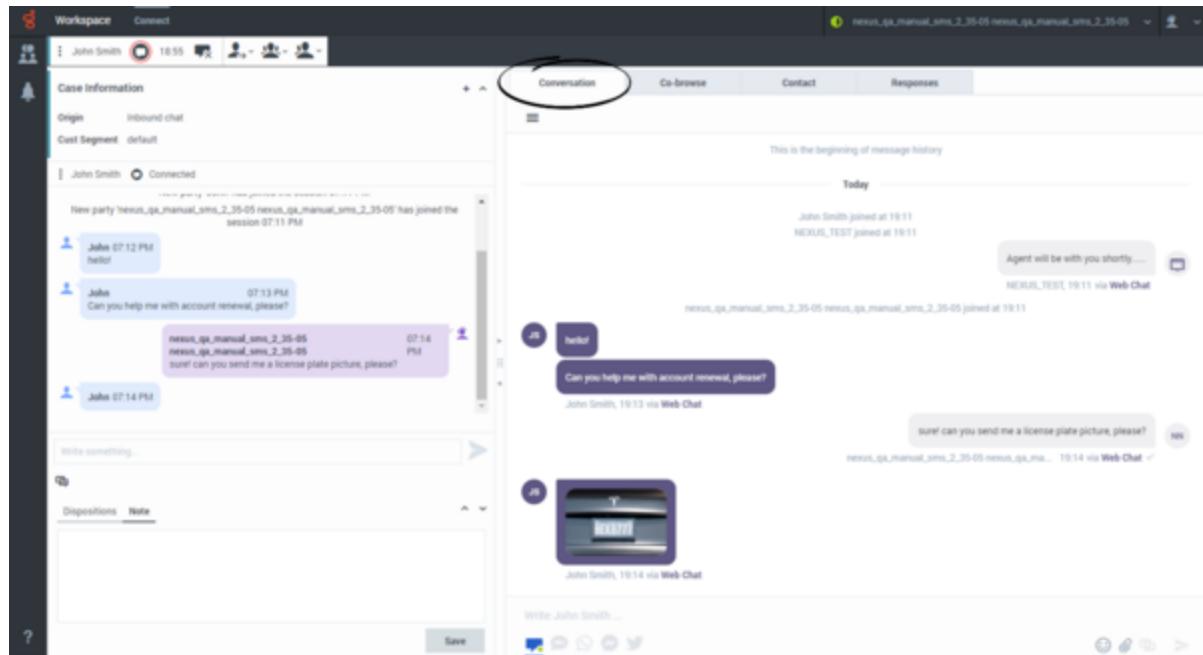
Agent User Interfaces

Asynchronous chat is integrated into Agent Workspace. Two new tabs are provided to enable advanced chat handling capabilities, the **Conversation** tab and the **Communication** tab.

Conversation tab

The **Conversation** tab displays the content of the current and previous interactions between the agent and a contact until the interaction is marked as **Done**. When an interaction is completed and marked as **Done**, it is removed from the **Conversation** tab. Agents can use the **Communication** tab to reactivate and resume an interaction by selecting the contact's name from the subscription list. Active interactions can be transferred from the **Conversation** tab.

Agents can use the Channel Selector in the **Conversation** tab to review and send messages using other Digital Channels that the contact has previously used to contact your organization. When an agent clicks a channel to select it, the transcript area updates to display the messages that have been exchanged on that channel. To send a message on that channel, the agent types something in the message composition field.
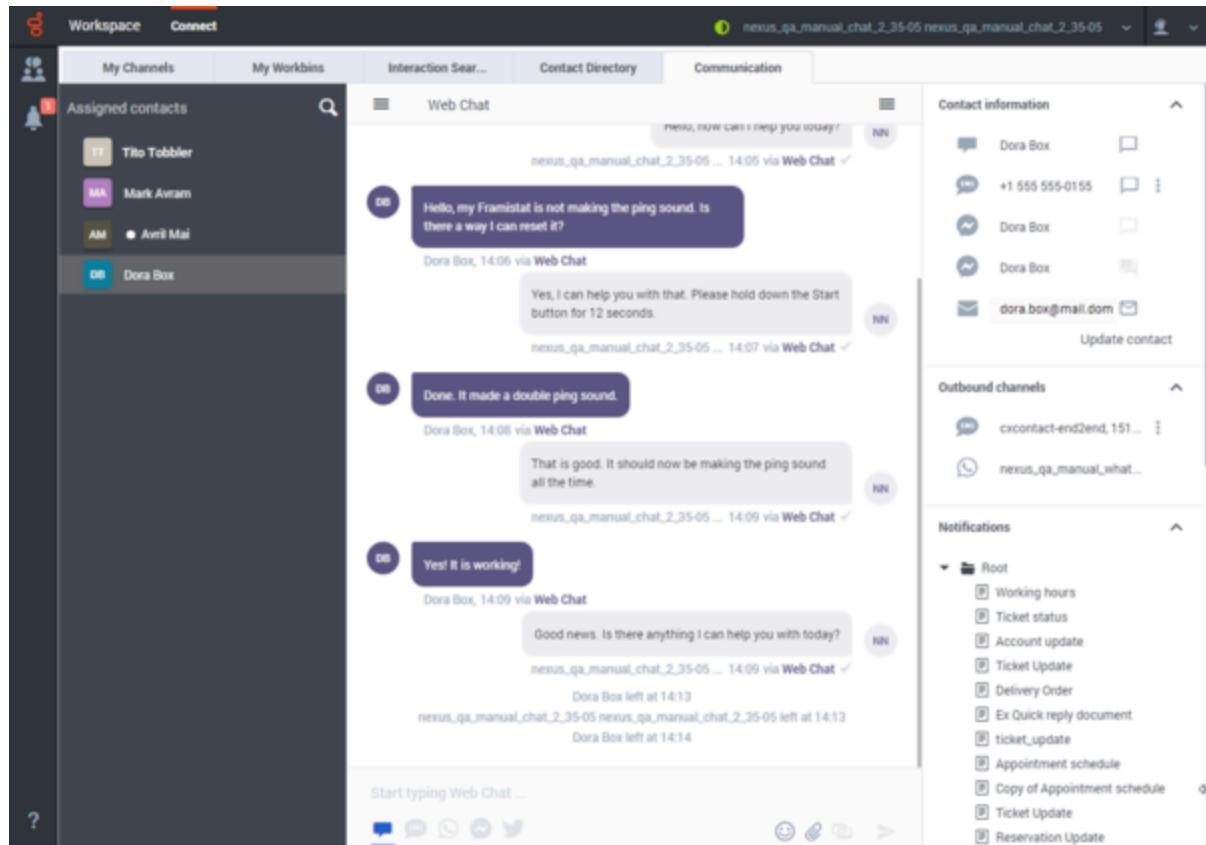
> **Important**
>
> Interactions no longer must be put on hold or placed in a workbin to extend conversations. Instead, agents access the **Communication** tab to view and reactivate interactions that are marked as **Done**.

Communication tab

The **Communication** tab enables agents to continue conversations with contacts using multiple channels from a single interface. The Communication tab includes the following features:

- **Assigned contacts**: A list of contacts that an agent is subscribed to. The contacts on this list are those that the agent has recently interacted with. More than one agent may be subscribed to the same contact. Agents can unsubscribe from a contact.

- **Transcript**: The transcript of all previous messaging interactions with the selected assigned contact.

- **Channel selector**: Agents can use the Channel Selector to review and send messages using other Digital Channels that the contact has previously used to contact your organization. When an agent clicks a channel to select it, the transcript area updates to display the messages that have been exchanged on that channel.

- **Message composition field**: A message field enables an agent to send a message to the contact without starting a new interaction or to start an interaction on one of the available channels.

- **Contact information**: A list of all the communication channels available for a contact. New interactions can be started from this view.

- **Notifications**: A library of structured messages that can be sent to contacts.

Supervision

Agent Workspace Supervisor features are all available with asynchronous chat, including real-time chat monitoring. Supervisors can use the **Communications** tab to search for a contact and then review all the transcripts associated with past interactions with the contact.

Subscription

The **Communication** tab has two views, the list of **Assigned contacts** and the transcript of interactions with a contact selected in the **Assigned contacts** list. The **Communications** tab displays up to 100 of the most recent contacts an agent has interacted with.

When an agent handles an interaction, the agent is automatically subscribed to the contact they interact with.

Subscribed contacts are automatically removed from the list if they have not had an interaction in the last 14 days. An agent can manually cancel a subscription by clicking the **X** next to the contact's name in the **Assigned contacts** list.
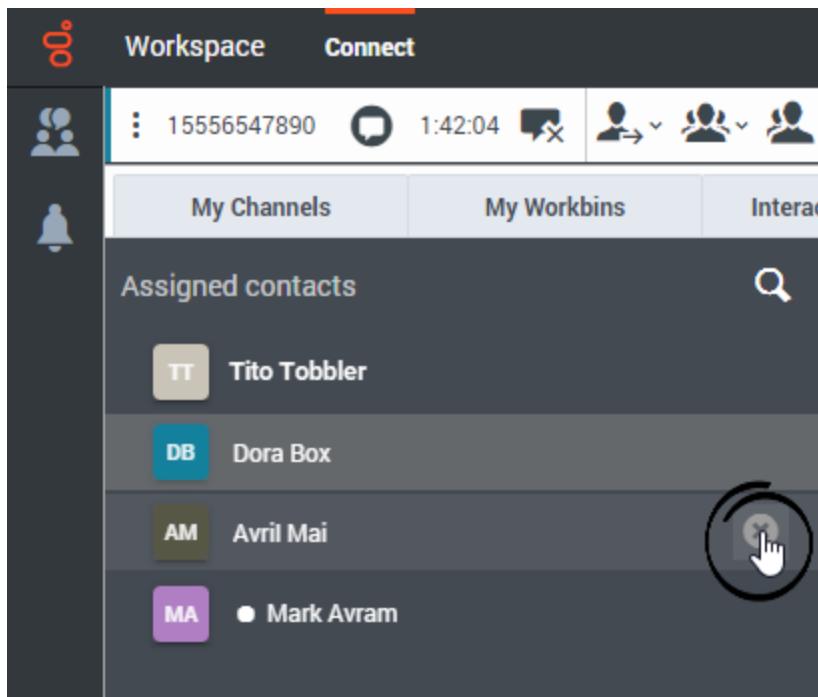
Cancelling a subscription does not delete the contact from UCS. Instead, the association between the agent and the contact is removed. To resubscribe to a contact, an agent can search for the contact using the **Search** feature and start an interaction without sending any message.

Multiple agent subscriptions

Multiple agents may be subscribed to the same contact. In this scenario, if a contact replies, all subscribed agents receive a notification. The first agent to accept the interaction handles it. Other subscribed agents can see the unread message indicator, but they must pull the interaction to see if another agent has replied to it or not. Refer to How subscriptions and notifications are handled for more details.

> ### Important
>
> There is no visual indicator to specify whether another agent has replied to the contact. Agents can review the transcript or history to determine the status of the interaction.
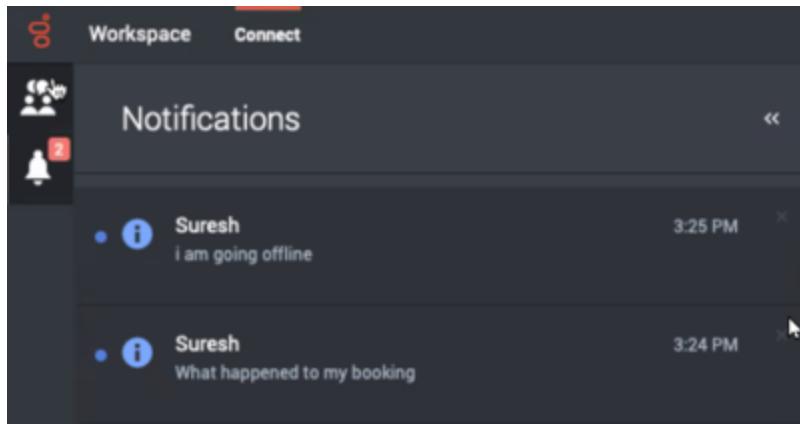
Typical use case of the subscription feature

Genesys recommends that agents handle chat interactions in the following ways to manage the number of subscribed contacts displayed in the **Communication** tab:

1. If a case is resolved and an agent does not expect any more contact messages for the case, they can mark the interaction as **Done**, then immediately navigate to the **Communication** tab, search for the contact name, and unsubscribe from the contact.

2. If an agent requires more time to research a case, they can mark the interaction as **Done** but do not unsubscribe from the contact. When the agent is ready to message the contact, they can find the contact in the **Communication** tab, then write a new message in the **Write a message** field to create a new outgoing message. This does not create a new interaction. It sends the agent's message to the contact. The next time the contact opens the chat they will access the message. The agent can also click the chat icon next to the contact name. This creates a new interaction.

> ## Tip
>
> - If an agent uses the **Write a message** option to send a message to a contact to whom they are not subscribed, the agent does not become subscribed to the contact.
>
> - The time the agent spent writing a quick reply message is not counted against any media or interaction.
>
> - The quick reply is added to the conversation history when the next interaction is created.
>
> - To be subscribed to a contact from the **Communication** tab, the agent must initiate an interaction by clicking the chat icon next to the contact name, or accept an interaction notification from the contact.

Manual subscription

The Search function in the **Communications** tab accesses the entire database. Agents can find a contact using Search, create an interaction (with or without actually sending a message), and then mark the interaction as **Done** to subscribe to the contact manually.

## How subscriptions and notifications are handled
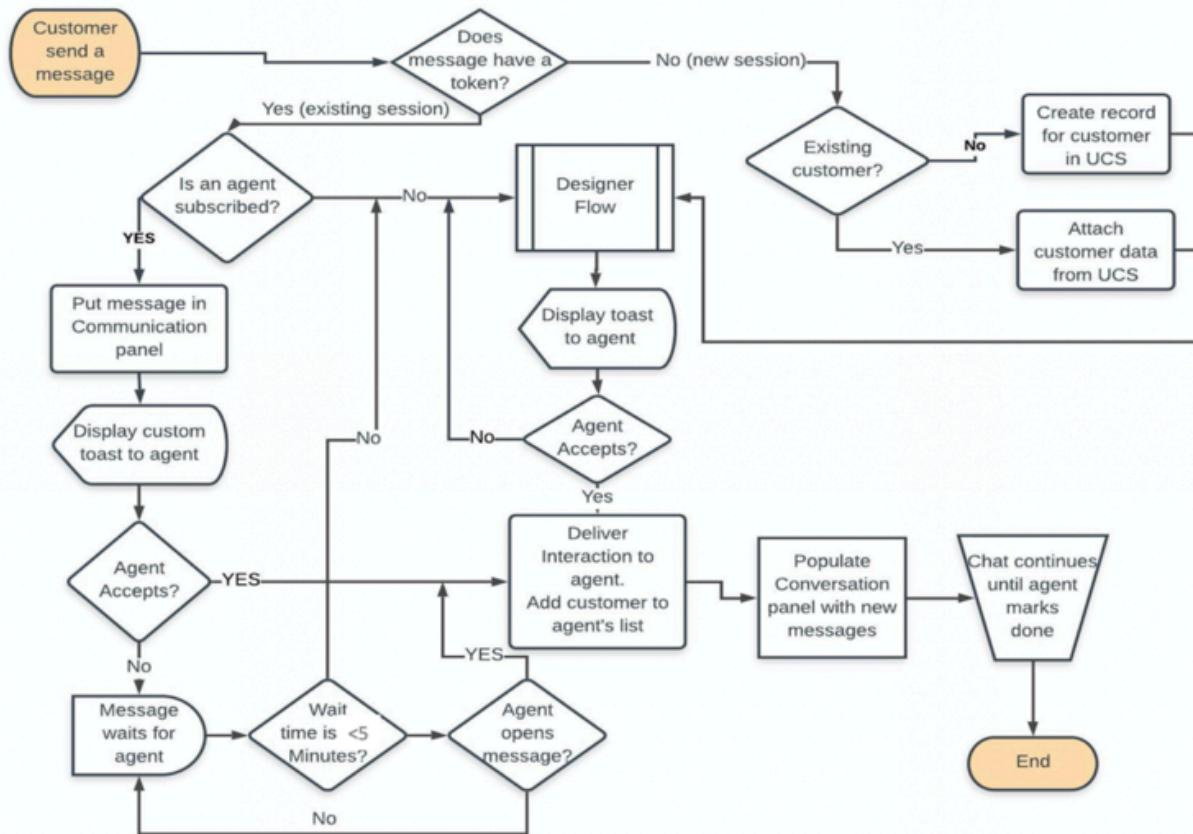
Subscribed agents are prioritized and assigned to an interaction whenever a contact replies to an interaction. However, if subscribed agents are unavailable when the *asynchold queue* timeout expires, the contact might be returned to the bot workflow. To prevent a contact from being sent back to the beginning of the bot workflow after the *asynchold queue* timeout expires, configure a strategy in Designer to handle this situation.

By default, the *asynchold queue* timeout is set to 5 minutes. To change the timeout, contact your Genesys representative. To skip the *asynchold queue* timeout, configure the **nexus_asynchold_enable** option. For more information, refer to the **Configuration** section of this article.

You can choose not to use Last Agent Routing in the Designer application. In that case, if an agent misses the notification of a contact reply (timeout is 30 seconds), an unread message indicator is displayed next to the contact customer in the **Communication** tab. If a subscribed agent is unavailable when a contact replies, the system routes the interaction to another qualified agent after the *asynchold queue* timeout (5 minutes). The agent to whom the interaction is transferred can access the previous conversations with the contact by using the **Conversation** tab.

Agent names are always displayed to contacts. If your preference is to prioritize using the same agent for a case, then you can configure the timeout for Last Agent Routing to be longer; however, this might result in longer wait times for contacts.

The following diagram shows a typical Last Agent Routing workflow:
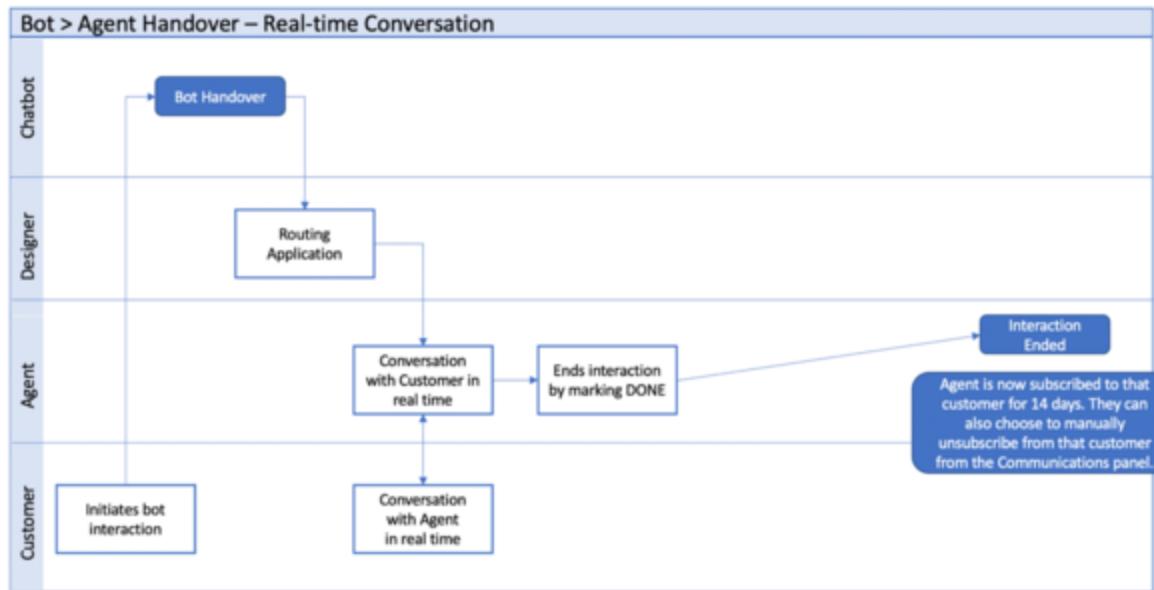
Chatbot to agent handover

Chat interactions are transferred to agents from Chatbots by applying routing strategies for the following channels:

- Chat
- Facebook
- Twitter
- WhatsApp
- SMS
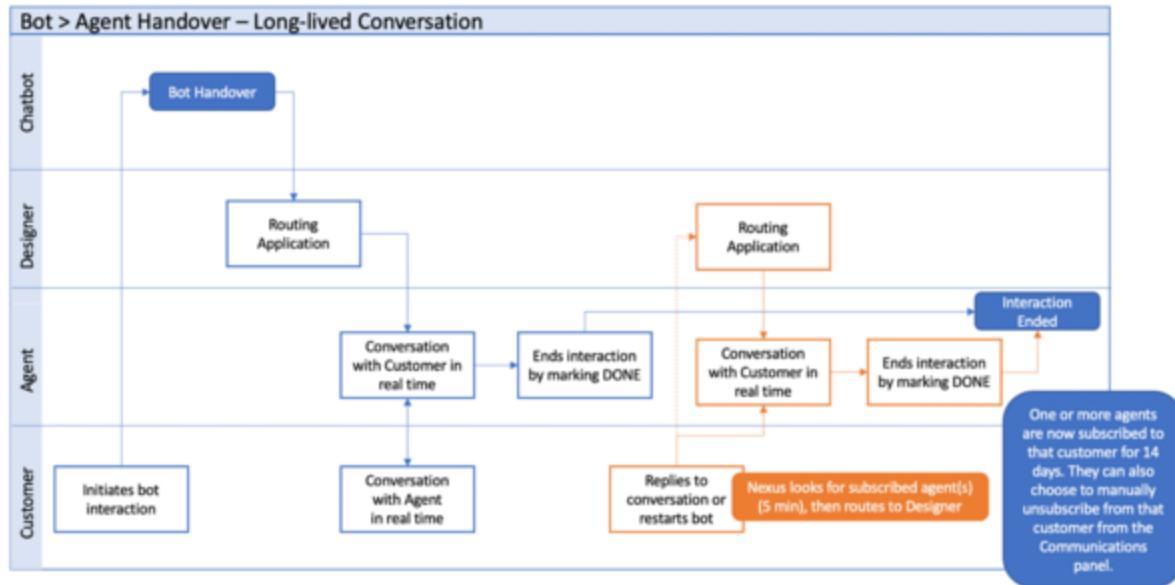
Configure Chatbot timeouts using Designer.

Real-time interactions

Chatbots and agent subscription

When an interaction is restarted by a contact, subscribed agents are notified about the interaction. If no subscribed agent is available before the *asynchold queue* timeout (the default is 5 minutes), Designer applies a bot workflow. To prevent a contact from being sent back to the beginning of the bot workflow after the *asynchold queue* timeout expires, you must configure a strategy in Designer to handle this situation. the strategy should send the interaction to the queue rather than back to the chatbot. This can be done by setting an attached data value to indicate that the contact has already interacted with the chatbot.

Configuration

> **Tip**
>
> If you want to make some of the following setting changes yourself, contact Genesys to enable the Digital Admin UI.

To connect Workspace Web Edition to Digital Channels, you might have to set the following options to specify the URLs for the chat service:

- **interaction-workspace/chat-nexus.service-url**: Specifies the Digital Channels (Nexus) service URL to access the chat service.
- **interaction-workspace/chat-nexus.web-components.url**: Specifies the URL of the Digital Channels (Nexus) Web Components if the URL is different from the service URL.

Genesys recommends that you set the value of the **interaction-workspace/privilege.chat.can-place-on-hold-async** option to **false** in the Workspace Web Edition application object.

The following table describes some of the features of Advanced chat. Some are configurable and some are not:

Parameter or Feature	Default	How to configure
Access to the **Conversation** and **Communication** tabs	Enabled	• privilege.chat-nexus.can-use

Parameter or Feature	Default	How to configure
		= true (Advanced chat is enabled) • chat-nexus.service-url (URL is set to the default for your deployment) • chat-nexus.web-components.url (URL is set to the default for your deployment)
Use the **Conversation** tab *but not* the **Communication** tab	Disabled (both are enabled by default)	privilege.chat-nexus.communication.can-use = false (disables the communication tab)
Hide/Show channel buttons in new UI	Agent will have access to all media's sessions	Agent should have annex in **nexus** section with **media** option that contains the comma-separated list of allowed media (allowed values **chat**,**sms**,**whatsapp**,**fbpublic**,**fbprivate**,**twdirectmessag**
Waiting time to search for subscribed agents	5 minutes	Contact your Genesys representative to change the timeout.
Skipping the *asynchold queue* timeout for Chat sessions to prevent the display of interaction notifications for subscribed contacts and redirection of the interaction to Designer for routing		To configure all sessions at the tenant level, contact your Genesys representative. To configure this feature for a particular session, add **nexus_asynchold_enable** = *false* to the User Data of the Chat session creation request (for example, the default User Data for the Chat session in Genesys Widgets).
Using the **Write a message** field in the **Communication** tab	Enabled	privilege.chat-nexus.communication.can-send = true
Continuing interaction sessions through Widgets	Enabled	Uncheck the **Enable Async WebChat** option in the Widgets configuration to disable this feature.
The maximum number of contacts to which an agent can be subscribed in the **Communication** tab	100	Not configurable.
Multiple agents subscribing to the same contact	Enabled	Not configurable.
Disable or force subscription for particular interaction	Tenant-level subscription settings will be used	Set **nexus_subscribe_on_accept** user data key to **true** (force subscription) or **false** (disable subscription) appropriately.

Parameter or Feature	Default	How to configure
Automatic cancelling of subscription to an inactive contact and removal of contact from an agent's **Communication** tab	14 days	Not configurable.
Timeout for finding agents or bots		The timeout is set in Designer.
The duration of interaction notifications to subscribed agents when a contact has replied	30 seconds	Not configurable.

How to hide the Communication and Conversation tabs

If you are a Multicloud CX user who has migrated to Digital Channels, you might want to use Digital Channels without retraining your agents to use the **Conversation** or **Communication** tab. Use this procedure to hide these tabs:

1. Open Genesys Administrator Extension (GAX) and navigate to **Configuration**>**Agent Groups**>.

2. In the **Options** tab of the agent group, for *each* of the following options, click **Add**, then specify the following parameters in the **New** dialog box:

   - **Section**: `interaction-workspace`

   - **Key**: Option name

   - **Value**: Option value, such as `true` or `false`, or a URL.

Option name	Value	Effect
privilege.chat-nexus.can-use	false	Disables Advanced Chat for each agent in the agent group.
privilege.chat-nexus.communication.can-use	false	Disables, the **Communication** tab is enabled for each agent in the group. Agents are not subscribed to contacts.
privilege.chat-nexus.communication.can-send	false	Agents in the agent group cannot send messages without starting a new interaction to a selected contact by using the **Write a message** field.

3. Click **Save** after all the options have been added.

4. Disable AsyncHold by adding **nexus_asynchold_enable** = *false* to the User Data of the Chat session creation request (for example, the default User Data for the Chat session in Genesys Widgets).

5. Add a customization to Genesys Widgets to end the chat session on the contact's side. Refer to: Terminate Chat session on contact side.

Reporting

Reports related to Advanced Chat

Genesys Multicloud CX Reporting on Advanced Chat interactions is based on the following constraints:

- All chat interactions are considered to be asynchronous; however, interactions might be asynchronous or synchronous.

- The **GCTI_Chat_AsyncMode** setting is always set to *true*.

> ### Tip
> Currently, Reporting does not distinguish between asynchronous and synchronous interactions.

The following real-time and historical reports are available for Advanced Chat.

Real-time reports

Reporting category	Description
Pulse - Popular reports	Popular real-time reports that are commonly included in dashboards.
Pulse - Agent reports	All agent and agent activity reports that are listed in the **Agent reports** section are included.
Pulse - Chat reports	The following reports are available: • **Chat Agent Activity** • **Chat Queue Activity** • **eServices Agent Activity** • **eServices Queue KPIs**

Historical reports

Reporting category	Description
Chat reports	All Chat reports that are available in the **CX Insights** > **Chat** folder are supported.

Reports related to agent workbin

Agent workbins are not supported for asynchronous interactions; therefore, there are no specific workbin reports. However, the **Queue Activity Report** in Pulse provides the following metrics:

- Chat Waiting

- Chat_In_Process
- Chat_In_Queue

Emulating synchronous chat

With Digital Channels, all the messaging based sessions, chats, SMS, WhatsApp, Facebook Messenger, and Twitter DM are asynchronous. However, you can set up your environment to emulate the features of synchronous chat.

Make the following configuration changes to adjust the way that chat interactions are handled:

Agent availability

With asynchronous chat, interactions enter the system regardless of agent availability, including off hours. To disable this feature, set the Chat Widget on your website to display only during business hours.

Last Agent Routing

Last Agent Routing (LAR) is enabled by default in Digital Channels. With LAR, new interactions are held for a specified amount of time while notices are sent to all agents who are subscribed to the contact This enables agents familiar with the contact to have an opportunity to handle the interaction before it is routed by Designer. To have each Designer handle each interaction routing set the value of **Asyc Hold** to **false**.

Contact side asynchronous messaging

By definition, asynchronous chat enables contacts to continuously send messages after an agent has ended the chat session. To disable this feature, you must add a customization to Genesys Widgets to close the chat widget on the contact's side. Refer to Terminate Chat session on contact side.

Communication tab

The **Communication** tab is the Digital Channels feature that enables agents to manage their contact subscriptions, view messaging transcripts, start new chat interactions, and send messages to contacts after an interaction is closed. To disable the ability to send messages after an interaction is closed, set the value of **Communication can send** to **false**. To hide **Communication** tab, set the value of **privilege.chat-nexus.communication.can-use** to **false**.

Conversation tab

The **Conversation** tab is displayed in the interaction view. It contains a transcript of previous interactions with the current contact. The **Conversation** tab also provides an enhanced chat view by providing additional features such as attachments.

Because some of the functionality of the **Conversation** tab is redundant with the Workspace Web Edition chat interaction view, you might want to hide one of these features:

- To disable the **Conversation** tab, set the value of the **privilege.chat-nexus.can-use** option to **false**.

- To disable the Workspace Web Edition Chat interaction view transcript and controls while retaining the additional functionality of the **Conversation** tab, set the value of the **privilege.chat-nexus.can-use** option to **true**.

Configuration summary

The following table summarizes the configuration settings you can make to control the behavior of Digital Channels UI features in Workspace Web Edition:

Options for emulating synchronous chat

Name	Description	Mandatory	Default value
chat-nexus.service-url	Specifies the Nexus (Digital Channels) service URL used to access chat API. For example: https://nex-dev.genhtcc.com	Yes	""
chat-nexus.web-components.url	Specifies the nexus-ux WebComponents url used to display the nexus-ux view (if it is different from the service url). For example: https://nex-dev.genhtcc.com/ux/webcomponents	No	""
privilege.chat-nexus.can-use	Enables the **Conversation** tab in the **Case Side View** (Workspace Chat interaction view).	No	false
privilege.chat-nexus.communication.can-send	Enables agents to send messages from the **Communication** tab without starting an interaction.	No	false
privilege.chat-nexus.communication.can-use	Enables the **Communication** tab in the Workspace Web Edition **Connect** group.	No	false

Configure Agent UI

Contents

Learn to integrate the Digital Channels powered interactions into the native chat transcript feature in Agent Workspace.

Related documentation:

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> ### Important
>
> The following configuration settings work for Chat, SMS, and direct messaging channels, but do not work with public social channels such as Facebook and Twitter.

In Agent Workspace, the original underlying iframe technology that fed conversations across chat, SMS, and messaging from Digital Channels is now replaced with a native implementation to improve the agent experience. If your organization uses the original iframe technology, refer to the configuration settings in this article to upgrade your Agent Workspace with improvements in Digital Channels.

Prerequisites

- From your existing configuration, remove all iframe integration related options. For detailed steps, see Removing iframe integration specific options.

Removing iframe integration specific options

Follow the steps below to remove the iframe integration specific options.

1. Open **Genesys Administrator Extension (GAX)** and navigate to **Configuration > Agent Groups >** .

2. Click the **Options** tab of Agent Group and remove the **Communication** and **Conversation** tab names from the below listed options in the **interaction-workspace** section. Typically, these tabs are configured in the following names: *NexusConversation* and *NexusCommunication*.

   - **workspace.web-content** option (remove the value **NexusCommunication** or its equivalent name from this option).

   - **workspace.interaction-content** option (remove the value **NexusConversation** or its equivalent name from this option).

Configure an Agent

In the **interaction-workspace** section of Agent Setup or GAX, the following options are in focus.

Nexus specific options

Name	Description	Mandatory	Default Value
privilege.chat-nexus.can-use	Allows viewing the **Conversation** tab in the **Case Side View**.	No	false
privilege.chat-nexus.communication.can-use	Allows viewing the **Communication** tab.	No	false
privilege.chat-nexus.communication.can-send	Allows sending messages from the **Communication** tab.	No	false
chat-nexus.service-url	Specifies the Nexus service URL to access the Chat API. For example, https://nexus-url.com/	Yes	NA
chat-nexus.web-components.url	Specifies the Nexus UX Web Components URL that displays the Nexus UX view (if it is different from the standard one). For example, https://nexus-url.com/ux/webcomponents, http://localhost:8081/ux (or empty)	No	{chat-nexus.service-url}/ux/webcomponents
privilege.chat-nexus.can-use-contact-history-detail	Ability to use the Nexus view for interaction history.	No	false
toggle.nexus-ux-history.enable	Ability to temporarily toggle the Nexus view in interaction history.	No	false
chat-nexus.standard-response.insert-rich-enabled	Disables the insertion of standard responses; also disables the insertion of standard responses in HTML format.	No	true

Agent Workspace specific options impacting Nexus UI

Name	Description	Mandatory	Default Value
privilege.chat.can-	Allows using emoji	No	false

Name	Description	Mandatory	Default Value
use-emoji-picker	picker.		
privilege.chat.can-push-url	Allows sending the PushURL message type.	No	false
chat.time-stamp	Shows time in chat transcript.	No	true
chat.typing-is-enabled	Enables typing notification.	No	true

Option for **nexus** Section

Name	Description	Mandatory	Default Value
media	A comma-separated list of sub-media that is allowed to an agent.	No	all sub-media

Set up Facebook and Twitter

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-
-

- Administrator

Learn how to integrate Facebook and Twitter into Agent Workspace.

Related documentation:
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Contents

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.

- Integrate with Genesys Hub

Enable Digital Shared Services

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

- Create Service Channel

Configure Agent Workspace

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:** The service channel you created previously is listed under **Manage Digital Endpoint** in Designer.

- Create a Designer application

Related documentation

See how users handle social media interactions in Agent Workspace.

- Facebook
- Twitter

Set up WhatsApp

-
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- Administrator

Learn how to integrate WhatsApp into Agent Workspace.

Related documentation:
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Genesys Digital Channels enables you to integrate WhatsApp into Agent Workspace. 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.

- To access Genesys Hub, contact your Genesys representative.
- Integrate with Genesys Hub

Enable Digital Shared Services

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

- To create service channels, contact your Genesys representative.

Configure Agent Workspace

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:** The service channel you created previously is listed under **Manage Digital Endpoint** in Designer.

- Create a Designer application

Related documentation

See how users handle WhatsApp interactions in Agent Workspace.

- WhatsApp

Integrate with Genesys Hub

Contents

- 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 documentation:
-

Complete the steps below to set up an account with Genesys Hub and enable channels and services. When you have finished, go back to Set up Facebook and Twitter or Set up WhatsApp to finish the rest of the setup.

> **Important**
>
> To get access to Genesys Hub, contact your Genesys representative.

Set up your account

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

You will 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

Link to video

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 use the channel.

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

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

If you have successfully authenticated, you see the following message: **Access_token successfully saved**.

After saving your channel, open the Genesys Hub application and save the **Channel ID** for further configuration.

Parameter	Variable	Type	Notes
Hub Service Channel ID	$channelId	UUID string	Your Hub service Channel ID

Set up Twitter: Create a Twitter service channel

Link to video

Create a Twitter service channel to listen for mentions of your keywords 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 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 you set up a channel to monitor mentions of Genesys on Twitter, some good 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 "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 keywords are even more generic.

Ambiguous keywords can clutter your inbound feed and, if the volumes are too high, Twitter might cut off access to data. 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 below Twitter's thresholds. After three days, Hub unblocks the keyword and you can add it back to your channel. If you must 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 Hub did not monitor while it blocked the keyword. **Note:** Hub does not block the keyword again 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**

Log into Facebook | Facebook

https://www.**facebook.com**/login.php?skip_api_login=1&api_key=1471742513057128&
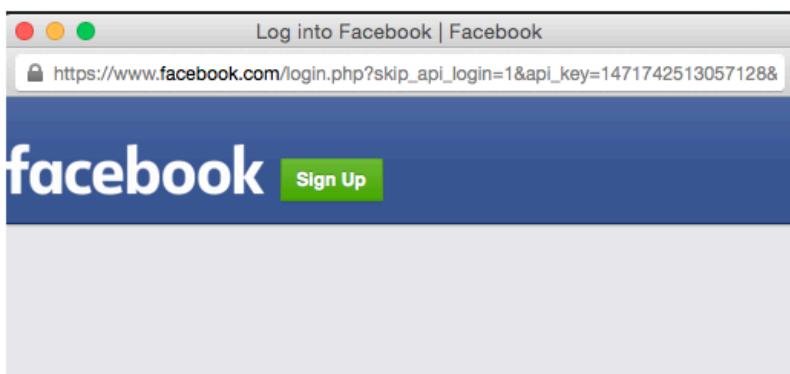
facebook Sign Up

Facebook Login

Email or Phone:	
Password:	

☑ Keep me logged in

Log In or **Sign up for 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 log in to 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 use the channel.

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

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

If you have successfully authenticated, you see the following message: **access_token successfully saved, close window**.

Set up Facebook: Create a Facebook service channel

Update Channel

Account	SteveO-Test
Channel Type *	Facebook
Channel Name *	'Genesys - Facebook Service'
Channel ID	56981c750f6c131a22914ad9
Description	Listen for posts on all Genesys Pages
Facebook Pages	Select pages to track
Queue history window	604800
Data Recovery	☐

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 use the channel.

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

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

Save the **Channel ID** for further configuration.

Parameter	Variable	Type	Notes
Hub Service Channel ID	$channelId	UUID string	Your Hub service Channel ID

Set up WhatsApp: Create a WhatsApp service channel

Create a WhatsApp service channel to communicate with your customers.

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

- Choose *WhatsApp: Service* for the **Channel Type**.
- Choose *Genesys Multicloud CX* 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 the phone display name in WhatsApp and it's visible to consumers in WhatsApp Messenger. Make sure that the name complies with WhatsApp policies: https://developers.facebook.com/docs/whatsapp/guides/vname.
- Add an optional description of how you 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 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. **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. Your Genesys representative might contact you to verify your WhatsApp channel, so make sure that all email addresses for the users registered in your account are valid. Next, Genesys verifies the channel and sets the state to VERIFIED.

After Genesys completes the full review, you'll receive an email indicating whether your request is approved. Your channel now has 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
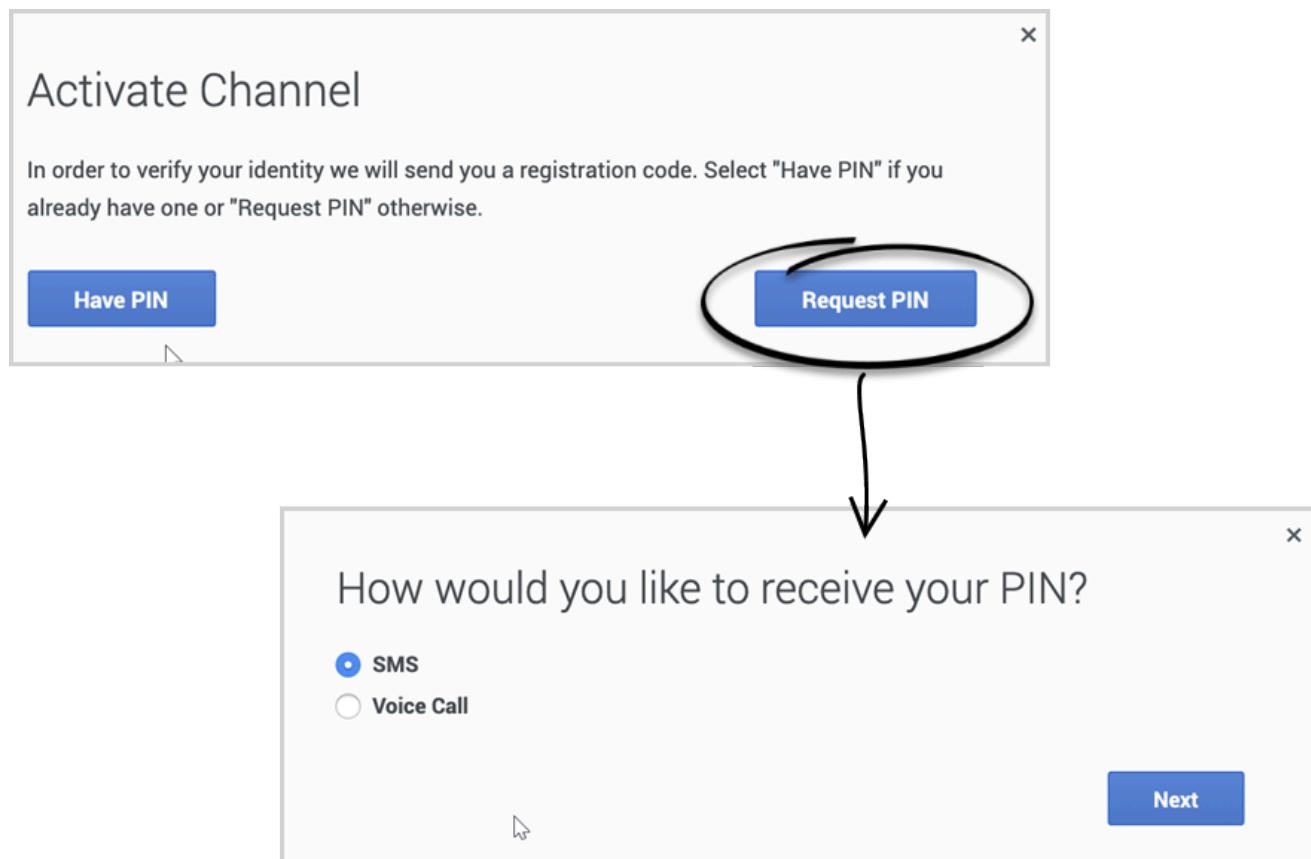
Activate your WhatsApp channel once you receive a registration confirmation email from Genesys.

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

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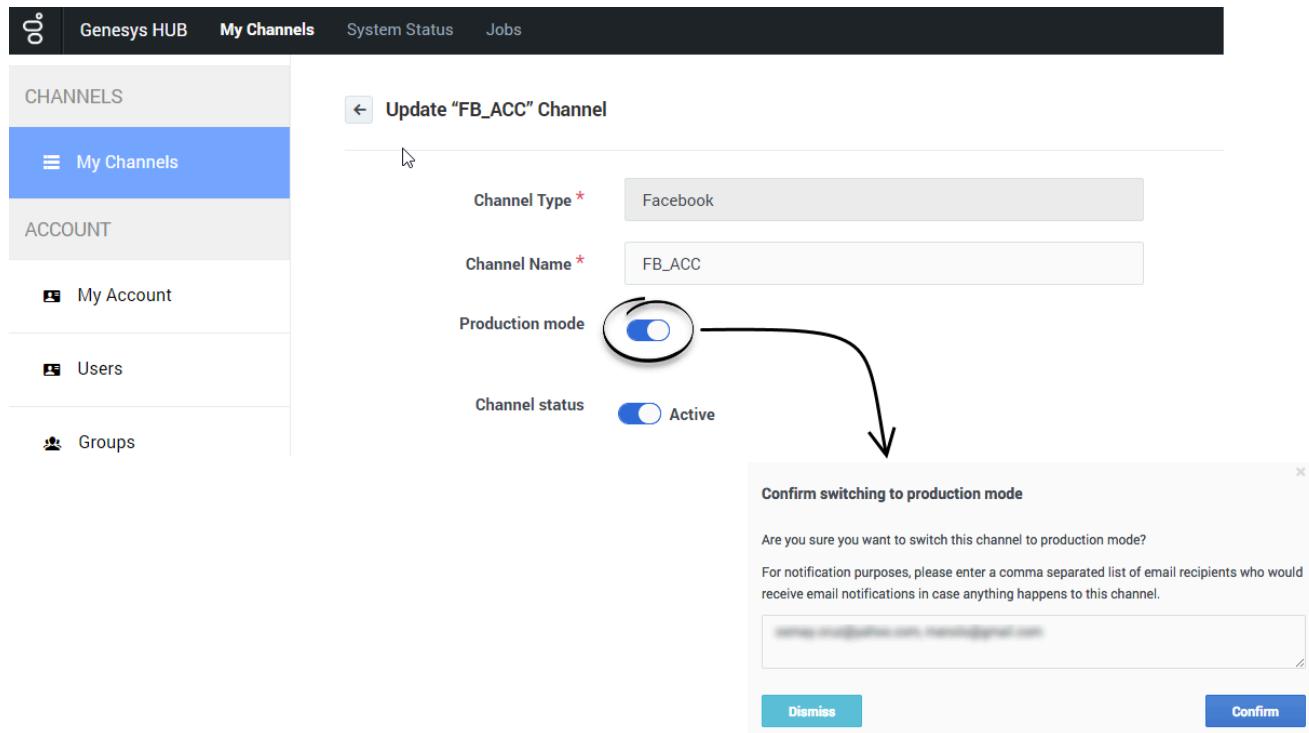
You can switch between production and non-production (lab, staging, test) modes for using a switch on each channel.

Under **My Channels** in the left navigation menu, edit a channel and slide the switch to the right to engage **Production mode**. On the confirmation window, add any email address that should receive notifications for the channel. Hub uses these addresses to create 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.
- Reports indicate whether the channel is in production mode.
- Production mode requires all required licenses to be in place.

Create Service Channel

Contents

- Administrator

Create a service channel for Twitter, Facebook, and WhatsApp. Set up an account with Genesys Hub and enable channels and services.

Related documentation:
-

Prerequisites

Review the **Prerequisites** table and make sure you have all the listed information before you get started. The values in this table are referenced later by the name in the Variable column.

Parameter	Variable	Type	Notes
Hub Service Channel ID	$channelId	UUID string	Your Hub service Channel ID. For setting up a service channel in Genesys Hub, see Integrate with Genesys Hub

Provision Facebook services in Digital Channels

- Log in to Platform Administration and go to **Environment > Transactions > NexusServices > Options**.

- Create a section that starts with 'chat.' for private messaging, starts with 'openmedia.' for public messaging, and includes some text. For example, `chat.facebook_private` or `openmedia.facebook_public`. Note: The 'chat.' or 'openmedia.' prefix is required and the rest of the value can be made up of letters and underscore or dashes, but not spaces.

- In this new section started with 'chat.', create the following options:

    - channelId = $channelId

    - channelType = facebook_messenger

    - interactionSubtype = FacebookPrivate

    - interactionType = Inbound

    - media = chat

- In this new section started with 'openmedia.', create the following options:

    - channelId = $channelId

    - channelType = facebook_public

- interactionSubtype = FacebookPublic

- interactionType = Inbound

- media = facebook

- Assign the service to the Designer application, follow to Applications

Provision Twitter services in Digital Channels

- Log in to Platform Administration and go to **Environment > Transactions > NexusServices > Options**.

- Create a section that starts with 'chat.' for private messaging, starts with 'openmedia.' for public messaging, and includes some text. For example, `chat.twitter_private` or `openmedia.twitter_public`. Note: The 'chat.' or 'openmedia.' prefix is required and the rest of the value can be made up of letters and underscore or dashes, but not spaces.

- In this new section started with 'chat.', create the following options:

  - channelId = $channelId

  - channelType = twitter_dm

  - interactionSubtype = TwitterPrivate

  - interactionType = Inbound

  - media = chat

- In this new section started with 'openmedia.', create the following options:

  - channelId = $channelId

  - channelType = twitter_public

  - interactionSubtype = TwitterPublic

  - interactionType = Inbound

  - media = twitter

- Assign the service to the Designer application, follow to Applications

Set up SMS

-
-
- Administrator

Learn how to integrate Short Message Service (SMS) into Genesys Multicloud CX.

Related documentation:
-

Contents

Genesys Digital Channels enables you to integrate Short Message Service (SMS) into Genesys Multicloud CX 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 send messages to the best-skilled agent using a Designer application or use CX Contact to send SMS alerts to your customers. Reporting is also available through Genesys CX Insights.

Configure an SMS number

Set up your SMS number in Genesys.

- To set up your SMS number, contact your Genesys representative.

Enable Digital Shared Services

Enable service channels in Agent Setup. SMS is considered as a part of Chat settings. Later when you create a Designer application to route SMS interactions, it pulls the data from these channels.

- To create service channels, contact your Genesys representative.

Configure Agent Workspace

Go through the normal process to configure any necessary desktop options for the agents in your contact center. Pay special attention to Chat as these settings apply to SMS.

- Agent Setup documentation
- Chat

Create a Designer application

Create a Designer application to route SMS interactions to the right agents. **Note:** The service channel you created previously is listed under **Manage Digital Endpoint** in Designer.

- Create a Designer application

Related documentation

See how users handle SMS interactions in Agent Workspace.

See how CX Contact can handle SMS campaigns for notifications and alerts.

- SMS Chat
- About CX Contact

About Digital Channels Admin

Contents

Find out how to get started with Digital Channels Admin.

Related documentation:

-

Get Started with Digital Channels Administrator

Digital Channels Administrators have full access to the admin settings for Digital Channels, which includes the ability to manage:

- PII
- Standard Responses
- Field Codes
- Custom Variables
- API Keys
- Tenant Settings
- SMS keywords

Access Digital Channels Admin

Log in to your Genesys Portal to access Digital Channels Administrator. Click the Digital Channels Administrator icon and enter your username and password.

Important

To access Digital Channel Admin interface, the agent must belong to *Administrators* or *Nexus Administrators* access groups.

Manage personally identifiable information

Contents

-

- Administrator

Learn how to assign rules and actions to incoming messages, emails, and workitems to protect your customers' private information.

Related documentation:
-

Use PII Rules Management to assign rules to all incoming messages in chat, SMS, WhatsApp, Facebook (private and public messages), Twitter (private and public messages), email, and workitems. These rules use regular expressions to detect private information that you can mask with the replacement text of your choice. For example, you could mask a phone number like this: (###)###-####

Important

Privacy rules are not applied to outgoing messages, such as those sent by a Designer application, an agent, or a bot.

You can create rules for any alphanumeric string that follows a defined pattern represented by a regular expression. When the rule finds a match, it masks the data with a custom-defined string. Here are some common private fields that you can match with a rule:

- Account number
- Credit card number
- Phone number
- Email address
- Date of birth

Access PII Rules Management under the **Privacy** menu.

PII Rules Management

+ Add New Rule

🔍 Search

Name ↑	Status	Order	Scope ⓘ	Media	Replace with	
3-digit PIN	⚪	21	HISTORY	WORKITEM	###	✎ 🗐 🗑
Credit Card	🔵	11	ALL	EMAIL	####-####-####-####	✎ 🗐 🗑
DOB	⚪	31	AGENT	MESSAGING	********	✎ 🗐 🗑
Phone number	⚪	500	AGENT	EMAIL, MESSAGING, WORKITEM	(###)###-####	✎ 🗐 🗑

Create or edit a rule

New Rule   ✕

Name *

Phone number

Description

Find a phone number and replace all digits.

Media *   **Order** *

MESSAGING, EMAIL, WORKITEM   ⌄   500

Scope * ⓘ

◉ Mask everywhere inside the system (ALL)

◯ Mask for specific cases: ☐ when being shown to agent (AGENT)

☐ when being saved to system for history purposes (HISTORY)

Regular expression *

/ (\d{3}\)\d{3}\-\d{4}   / g ⌄

Replace with

(###)###-####

Test message

My phone number is (425)555-1212

Test

Test result

My phone number is (###)###-####

Save

When you create a rule, a **New Rule** view opens on the right side of the page. To begin, give your rule a name and a brief description.

Next, choose the types of **Media** for which the the rule should apply. Note: The MESSAGING type represents all chat, SMS, and social media messages.

The **Order** determines the sequence in which rules are applied to the message, starting with the lowest number. The default is 500, but you can choose any value between 0 and 9999. You can also update the order after the rule is saved.

> ### Important
> Genesys does not recommend assigning the same order value to multiple rules in the same scope.

Choose when to apply the rule to the message by selecting the **Scope**. If you mask the data everywhere inside the system (ALL), then the rule is applied right after the user sends a message during the interaction. The data is permanently removed for the message and can't be retrieved later. **If the media is an email or workitem, you must choose this option.**

If you mask for specific cases, then the system treats the data as follows:

- AGENT - The rule is applied when the user's message displays to the agent. The data is saved in the system and can be retrieved later.

- HISTORY - The rule is applied when the message is saved to the system for historical purposes. With asynchronous messages, personal information in the active segment of communication is only visible to the agents who own the active interaction. Personal information in the previous communication segments is hidden.

The **Regular Expression** determines which information to replace in the message. You must use ECMAScript syntax to define the regular expression. The regular expression text area also has a dropdown to set flags for global, multi-line, or case-insensitive searching.
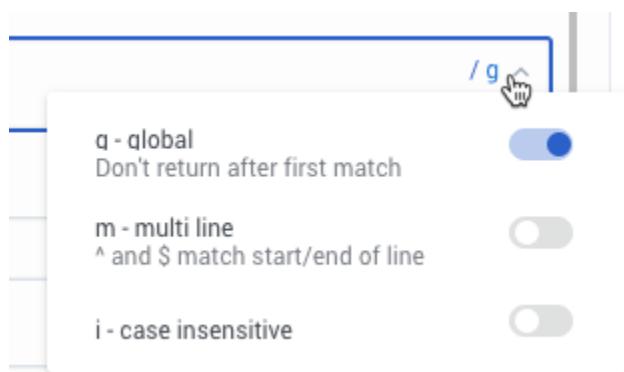
The **Replace with** string is ***** by default. You can change this value to any pattern that makes sense for your use case. For example, it could be (###)###-#### to mask a phone number.

PII Rules Management also supports partial masking.

Finally, don't forget to test your rule before saving.

Test a rule

PII Rules Management includes a testing feature you can use to confirm that the rule is working as expected.

To test, open the rule and enter a **Test message**. When you click **Test**, the **Test result** field shows how your rule handles the test message.

You can adjust your regular expression and replacement text as needed, just remember to click **Save** when you have finished.

Change a rule's status

After you create a rule, you can manage whether it is enabled with the **Status** switch ( ). The switch is off by default, which means the rule is not applied to messages. Any changes to the status take effect immediately.

Reorder a rule

After you create a rule, you can change the order in which it is applied. Hover over the **Order** cell and increase or decrease the value in increments of 10.
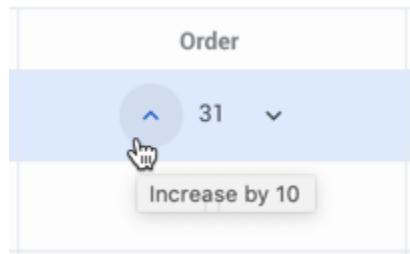
Copy a rule

You can copy an existing rule with the **Copy** button ( ). This opens the **New Rule** view with the copied rule information. The name of the rule includes "_*N*", where "*N*" is the number of the copy. For example: Rule_1, Rule_2, and so on.

Delete a rule

To delete a rule, just click the delete icon (🗑). If you just want to disable the rule temporarily, consider changing the rule's status instead.

Best practices

Here are some key best practices for managing personally identifiable information:

1. Create the minimum number of privacy rules. It's difficult to analyze and maintain many privacy rules.

2. Create the strictest possible regular expressions. For example, if you want to mask a credit card number, make sure you're not masking *any* 16-digit number. Your regular expression should be as specific as possible to the data you are masking, such as:

   - Start with a new word

   - End a word

   - Have specific delimiters

   - Have specific numbers in particular positions

Regular expression examples

Here are examples of some common regular expressions:

Credit Card (Visa and MasterCard only)

```
(?:^|(?]))(?:4\d{3}|5[1-5]\d{2}|6011|622[1-9]|64[4-9]\d|65\d{2})[ -.=\n\r]{0,10}\d{4}[ -.=\n\r]{0,10}\d{4}[ -.=\n\r]{0,10}\d{4}(?:$|(?=[\Da-zA-Z(),.:;?!"'`
```

SSN (Social Security Number - U.S. only)

```
(?:^|(?]))(?!000|666|9)\d{3}[ -.=\n\r]{0,10}(?!00)\d{2}[ -.=\n\r]{0,10}(?!0000)\d{4}(?:$|(?=[\Da-zA-Z(),.:;?!"'`
```

Partial masking

You can partially mask sensitive information by using capturing groups in your regex. Use $ in the **Replace with** field for any group you want to exclude from the mask.

To exclude more than one capturing group, each subsequent group must have at least one replacement symbol before the group in the **Replace with** field.

Manage standard responses

Contents

-

- Administrator

Learn how to manage the standard responses you send to customers.

Related documentation:

-

Standard responses are a way for your organization to define a set of prewritten responses. Agents or automated processes can send these responses to customers in email, chat, SMS, WhatsApp, Facebook, and Twitter interactions.

A standard response is a text template with keyword placeholders, called field codes, that the system replaces with appropriate text for the recipient. This template results in a standardized, yet custom message that is crafted according to the situation and customer. Genesys uses standard responses as suggestions for agents, acknowledgments, and autoresponses.

Agents can further personalize the standard response by editing it in their desktop before sending the message to the customer. For more information about how agents use standard responses, see the Agent Workspace Agent's Guide.

This topic covers the steps to create standard responses using Standard Responses Management. At a high level, you must:

1. Plan your category tree. A category tree provides the framework for organizing your standard responses.

2. Build your category tree.

3. Create your standard responses.

4. Use Field Code Management to create field codes, then add them to your standard responses. Field codes are the keyword placeholders you can use to personalize standard responses.

Access Standard Responses Management under the **Responses** menu.

Standard Responses Management
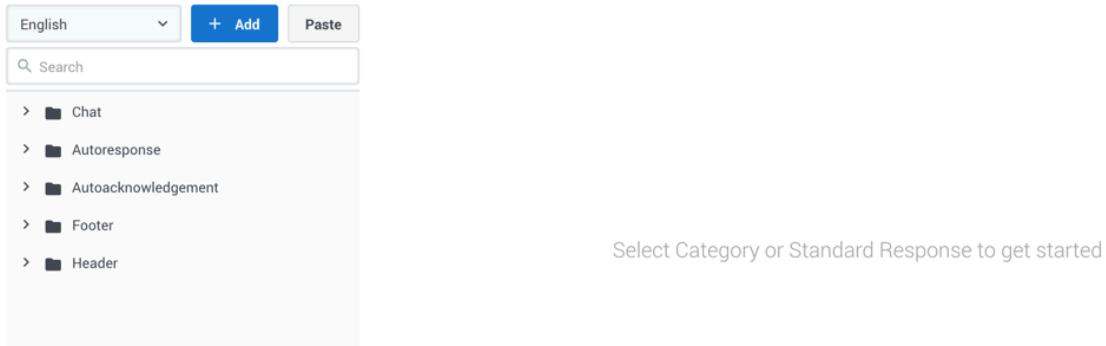
Plan a category tree

A category tree is a way to organize your library of standard responses into a structure that is easy to access and manage.

A category tree consists of one or more "root categories" (units of knowledge), each of which can have subcategories or even sub-subcategories. These categories and subcategories contain the standard responses.

It's important to plan your category tree ahead of time. You can edit it as needed, but a little thought now will save time and frustration later. When planning, think about the root categories and subcategories that make sense in your business.

Let's use an online store as an example. Our store website can handle both chat and email interactions from customers. We want to send different responses depending on the interaction type, so let's make root categories for Chat and Email. Those root categories need subcategories for the most common reasons customers contact us: Orders, Returns, and Rewards.

Since Orders is a large topic, let's break it down into sub-subcategories: Order Status and Order History. Our site supports French and English, which means we must actually create two category trees—one for French and one for English.

Here's how our English **Category Tree Plan** looks:
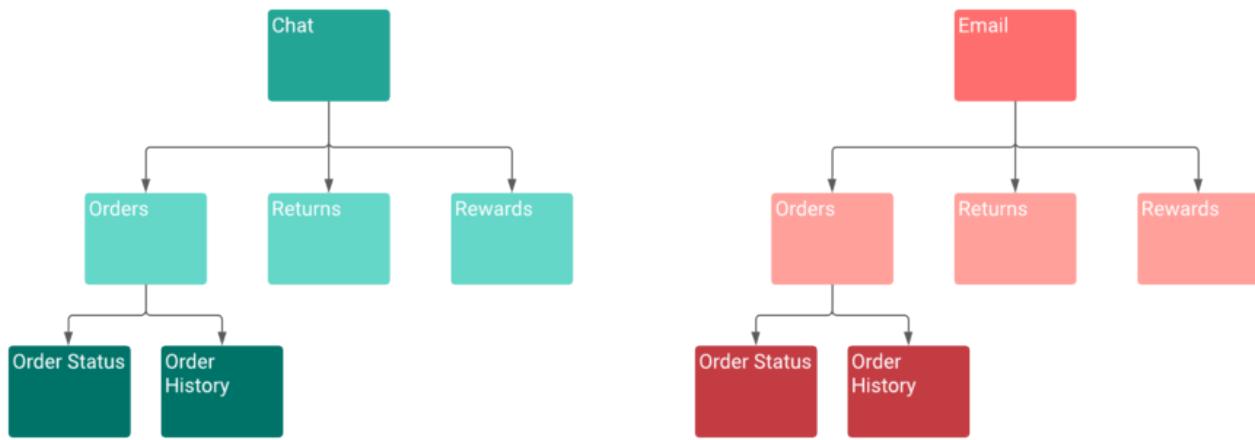
The way you organize your categories is subjective and depends on the needs of your business. For example, we could have made root categories for Orders, Returns, and Rewards. Then populated those categories with standard responses that are named as interaction types (Return Label Chat, Return Label Email, and so on).

Here's how this **Alternate Category Tree Plan** looks:
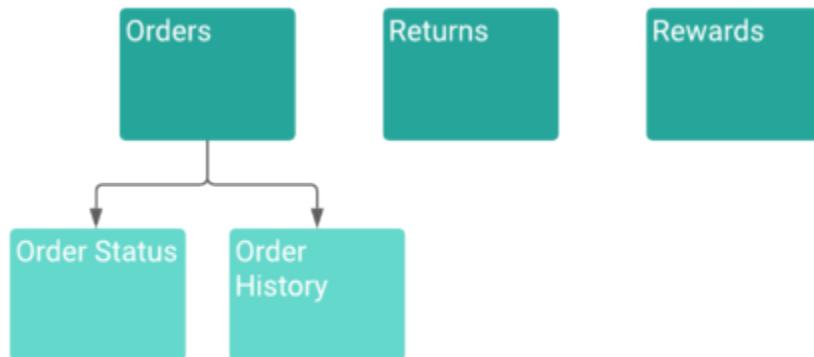
You can have a category with no standard responses—its purpose is to group other categories together. However, a standard response must belong to a category.

Category membership is inherited. For example, Chat includes Orders, and Orders includes Order Status and Order History. Then Chat also includes Order Status and Order History.

Build a category tree

Now that planning is complete, it's time to build the category tree. In these instructions, you build the category tree first and then add standard responses, but you can also add standard responses as you build your category tree.

Create or edit a category

> ### Important
>
> Category folders with the star icon (⭐) cannot be edited. These categories are created and managed in Workload Manager for Intelligent Workload Distribution and Engage Cloud Email and are critical to proper functionality. While you can't edit the category, you can still create, edit, and delete standard responses within the category.

To begin, choose a language from the drop-down—remember, your category tree is specific to the language.

Next, click **Add** to create a root category. In the category editor, give your category a name and helpful description. After you save, the standard response table displays. You can use this table to add standard responses now or continue defining your tree.

> ### Important
>
> The category name can consist of no more than 64 alphanumeric characters supported in UTF-8. For more valid characters, see Characters allowed in names.

Once you have a root category, select its menu (⋮) and add a child category. You set up child categories the same way as root categories. First, define the category in the editor and then add standard responses as needed.
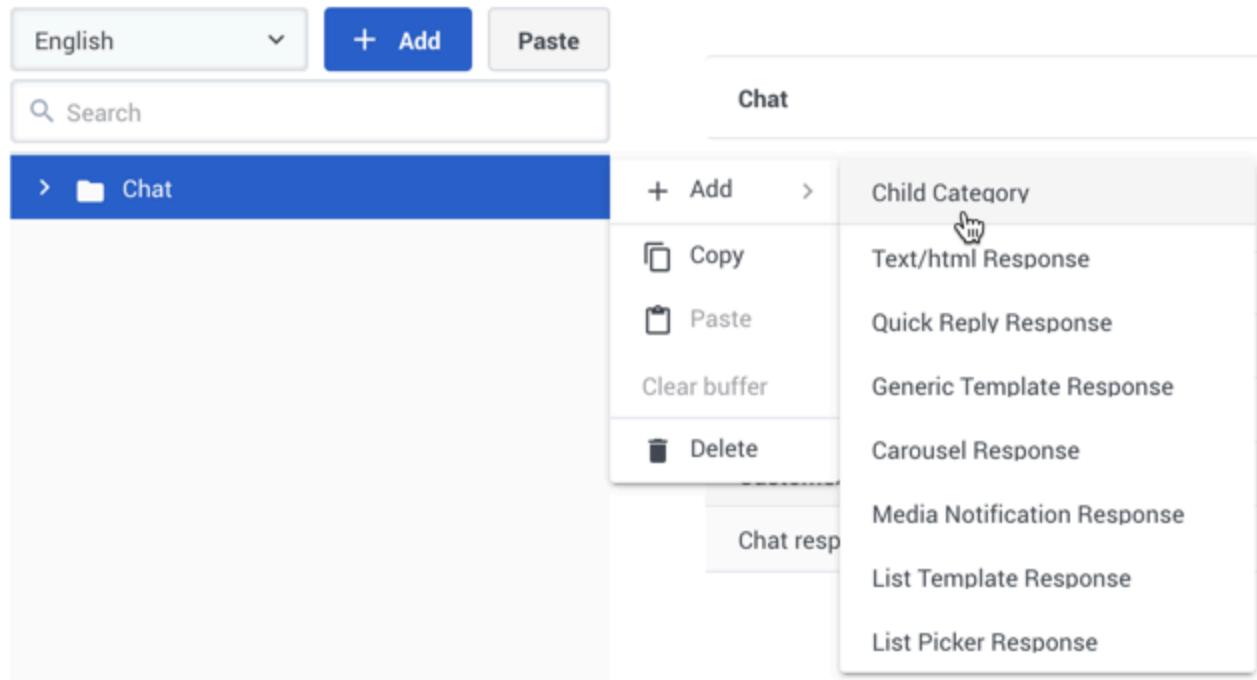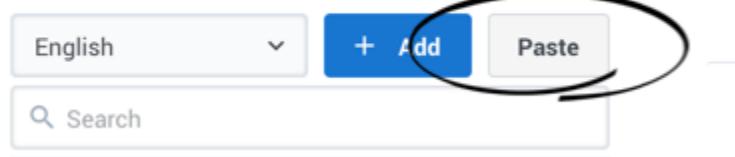
Continue adding categories until your tree is complete. As you work with your category tree, you can adjust the layout by using the copy and paste feature or deleting a category.

Copy and paste a category

Use the category menu (⋮) to **Copy** a category.

To save a copied category as a root category, click **Paste** in the main sidebar.

To save a copied category as a sub-category, click the menu (⋮) of the new parent category and select **Paste**.

The copied category is saved as "_N", where "N" is the number of the copy. For example: Chat_1, Chat_2, and so on.

You can also use the category menu (⋮) to **Cut** a category, and then paste it as previously described.

Choose **Clear buffer** to clear the contents from your computer's clipboard.

Delete a category

You can delete a category by choosing **Delete** in the category menu. If you delete a category, all of its subcategories and standard responses are also deleted.

Create or edit a standard response

You can create a standard response in two ways:

1. Open the category menu and click **Add**.

2. Edit the category and add click **Add**.
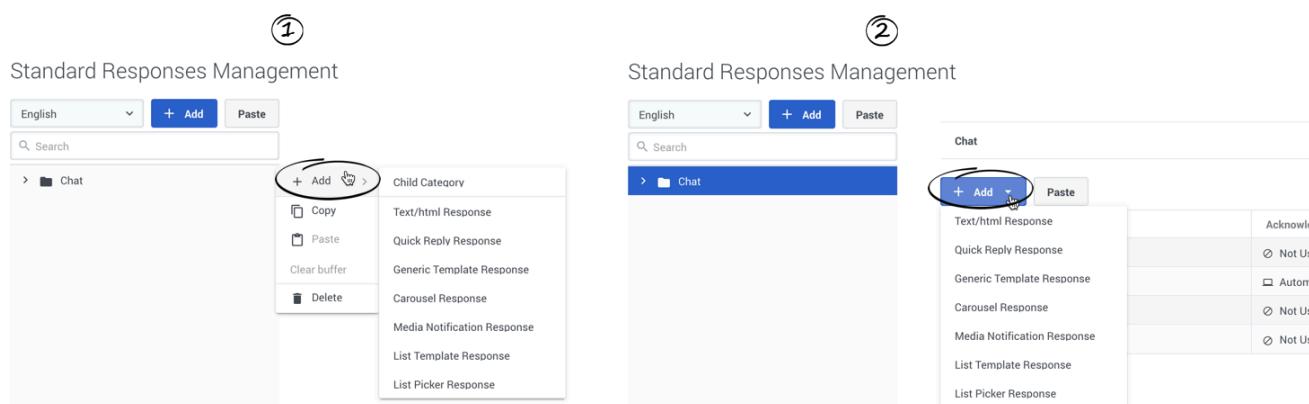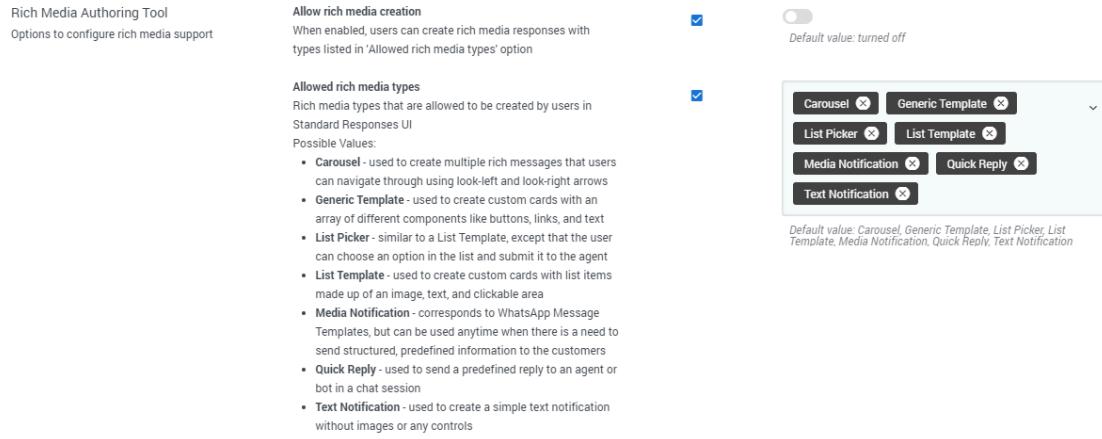
Either method opens a sub-menu where you can choose the type of standard response to add. Standard Responses can be made up of plain text or HTML content, or they can use one of the following Genesys Widgets rich messaging templates:

- Quick Reply
- Generic Template
- Carousel
- Media Notification
- List Template
- List Picker

> ### Important

To allow agents create standard responses with rich media content, the **Allow rich media creation** option must be enabled in the Tenant Settings and the **Allowed rich media types** option must include the set of templates that the agent can use.

Name section

To get started, choose a standard response type. In the standard response view, you can set the name and description, Content, Attachments, and Properties. Enter the name and description and **Save**. The standard response view updates to display fields specific to your chosen response type.

> ### Important
>
> The standard response name can consist of no more than 128 alphanumeric characters supported in UTF-8. For more valid characters, see Characters allowed in names.

Content section

Most of the fields in the Content section depend on the type of standard response. However, you can insert field codes to customize any type of standard response. To add a field code, select a field code in the drop-down menu. You can also set browser's hotkeys to insert field codes. See Use field codes or details. You can also expand this section to view it at full width, which is helpful for rich messaging standard responses.

When you create a rich messaging standard response, you can **Preview** how it looks in a Genesys

Widgets webchat widget in either the Dark or default theme. This preview updates dynamically as you make changes in the form. You can interact with rich message fields, including button clicks, opening links, and selecting items.

Rich messaging standard responses also have a JSON view that updates dynamically and shows how the response is structured. Any changes you make directly in the JSON are reflected in the form and preview areas. This view has a toolbar of options you can use to format, sort, and fix the JSON.

> **Important**
>
> Genesys does not recommend changing values in JSON views. Resolve the identified issues using the left menu.

The following sections provide more information about the Content fields for each response type:

- Text/HTML responses
- Quick Reply responses
- Generic Template responses
- Carousel responses
- Media Notification responses
- List Template responses
- List Picker responses

Attachments

In the Attachments section, you can add or remove an attachment by drag-and-drop or browsing your computer. When adding an attachment, make sure to consider the channel type you are targeting for the standard response and align the attachment type with the channel. Different channel types might have different limitations on what is acceptable.

Properties

In the Properties section, define whether the standard response is used manually, automatically, or not at all for these scenarios:

- Acknowledgment—The standard response is sent through Designer to acknowledge the receipt of a message. For example: "Thank you for your email. One of our agents will reply to you in the next 24 hours."
- Autoresponse—The standard response is sent by agents to an incoming interaction. It can also be used by Designer if you can be certain the customer's message is answered in this response.
- Suggestions—The standard response is offered to agents as suggested wording to use in their own replies to interactions.

Finally, set a start date (today's date by default) and specify whether the standard response expires.

If a standard response expires, it has the following effects:

- Designer cannot use the standard response in a new or modified application.

- If a Designer application saved a standard response after the expiration date, Genesys does not send the standard response. Instead, Genesys returns an error message.

When your standard response is ready, click the check box to approve. You can only use approved responses in Designer applications and for Agents.

Text/HTML responses
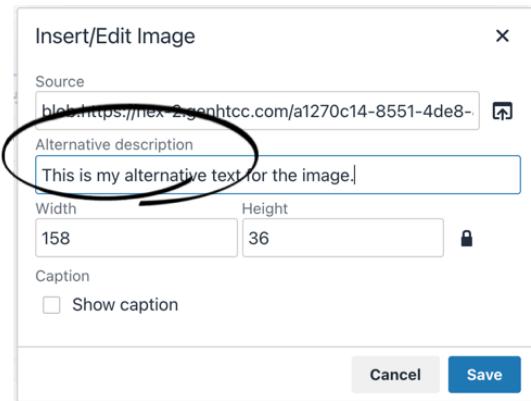
The content of a Text/HTML response can be in either plain text or HTML, depending on the type of standard response. For example, use plain text for SMS responses and HTML for email.

The text mode supports using Markdown syntax to compose responses. The following Markdown elements are supported:

- Headers
- Bold text
- Italic text
- Bullets

- Number bullets

- Links

- Images

- Strikethrough

- Backticks (Code)

HTML mode includes an integrated editor. Most of the buttons provide commonly used editing functionality, including the option to insert a link to an image. If you aren't sure what a button does, hover over it to open a tooltip.
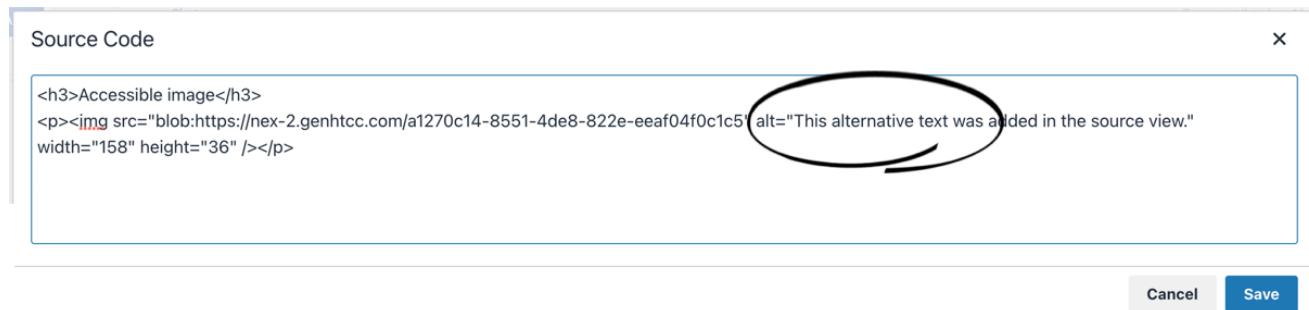
Make images accessible

You can make images in your HTML-based standard responses accessible by adding alternative text. In HTML mode, click the **Insert/Edit Image** button to add your image and include the alternative text in the **Alternative description** field.

You can also add the "alt" attribute directly to the tag when working in the source view (< >). If an external image link is not present, the customer sees an alternative description in HTML. The HTML content grows in size when images are saved in base64 format, but they are always displayed in HTML text.

Quick Reply responses

A Quick Reply is a simple way for customers to send a predefined reply to an agent or bot in a chat session. See Quick Replies for details.

To create a Quick Reply, define a **Message** to accompany your replies. Next, click (+) to define at least one reply. Enter the **Text** for the reply and, optionally, add an image to display next to the text. As you edit these fields, the Preview pane updates dynamically to reflect your changes.

Generic Template responses

Use a Generic Template to create custom cards with an array of different components like buttons, links, and text. See Generic Template for details.

To create a Generic Template, first define a **Fallback message** to display to users who don't support rich messages. This field is populated by default, but you can adjust it to whatever suits your needs.

At a minimum, give your Generic Template one of the following fields: **Title**, **Description**, **Image**, **Video**, or **Component**.

To format text in the **Description** field, highlight one or more words and click the related button for bold, italic, strikethrough, or code. Avoid combining additional symbols with formatting symbols and text for precise formatting.

The Generic Template is divided into clickable areas that each have their own defined action. The top-level clickable area includes the title, description, image, and video. Define the action for this clickable area by choosing from the **Action** drop-down. "OpenURL" is supported. Next, choose the **URL Target**, which specifies where the link opens. "Blank" (open in a new tab or window) is

supported. Finally, specify the **URL** for the clickable area.

Each **Component** you add is also its own clickable area, in the form of a button. To create a component, click (+). The **Text** displays in the button, while the **Title** displays when a user hovers over the button.

Define the action for this clickable area by choosing from the **Action** drop-down. As with the top-level area, choosing "OpenURL" prompts you for a **URL Target** and the **URL**. If you choose "Textback", specify the text you want to send back to the agent when the customer clicks this button.

Carousel responses

A Carousel shows multiple rich messages that users can navigate through using look-left and look-right arrows. See Carousel for details.

To create a Carousel, first choose the **Type**. You can choose only one type per Carousel, from the following rich messaging types: Generic Template, List Template, and List Picker.

Next, define a **Fallback message** to display to users who don't support rich messages. This field is populated by default, but you can adjust it to whatever suits your needs.

to define your **Messages**, click (+) . The fields displayed in this section depend on which type of Carousel you chose. Don't forget to use the arrows (⌄⌃) to expand and collapse **Messages** and **Components** so they're easier to view.

In the Preview, you can use the look-left and look-right arrows to view your messages the same way a user would.

Media Notification responses

Media Notifications correspond to WhatsApp Message Templates, but you can use them anytime you must send structured, predefined information to your customers. Use parameters and field codes to

customize these notifications with details that are specific to your customer, such as their name or account information.

> ## Important
>
> Before continuing, you must upload the message to WhatsApp for approval before you can finish creating the media notification in Standard Responses. See the WhatsApp documentation for more information.

A Media Notification standard response has four sections:

1. Header (optional)

2. Body (required)

3. Footer (optional)

4. Buttons (option)

When you insert Custom Variables (created in the Custom Variable tab) and System Variables (created by the system and related to interaction, agent, and customer) in the expected fields, the **RENDER** button appears. Click the **RENDER** button to fetch the default values of custom and system variables.

Header

In the Header section, choose the type of content to include, Text or Media.

If you choose Text, the display updates with a **Content** field where you can add some introductory text, such as a greeting. To insert a parameter in the **Content**—a name, for example—click (⎘). In the Parameters section, give your parameter a **Name** and **Value**, such as a field code so you can personalize the greeting.

If you choose Media, select the file type (**File**, **Image**, or **Video**) and upload the file.

Body

In the Body section, provide an **ID**. (After WhatsApp has approved the media notification, it sends the **ID** to you.)

In the **Content** field, fill in the main text for your message and add any necessary parameters. To format text, highlight one or more words and click the related button for bold, italic, strikethrough, or code.

Footer

If your notification requires a Footer section, choose Text from the drop-down and provide some **Text**.
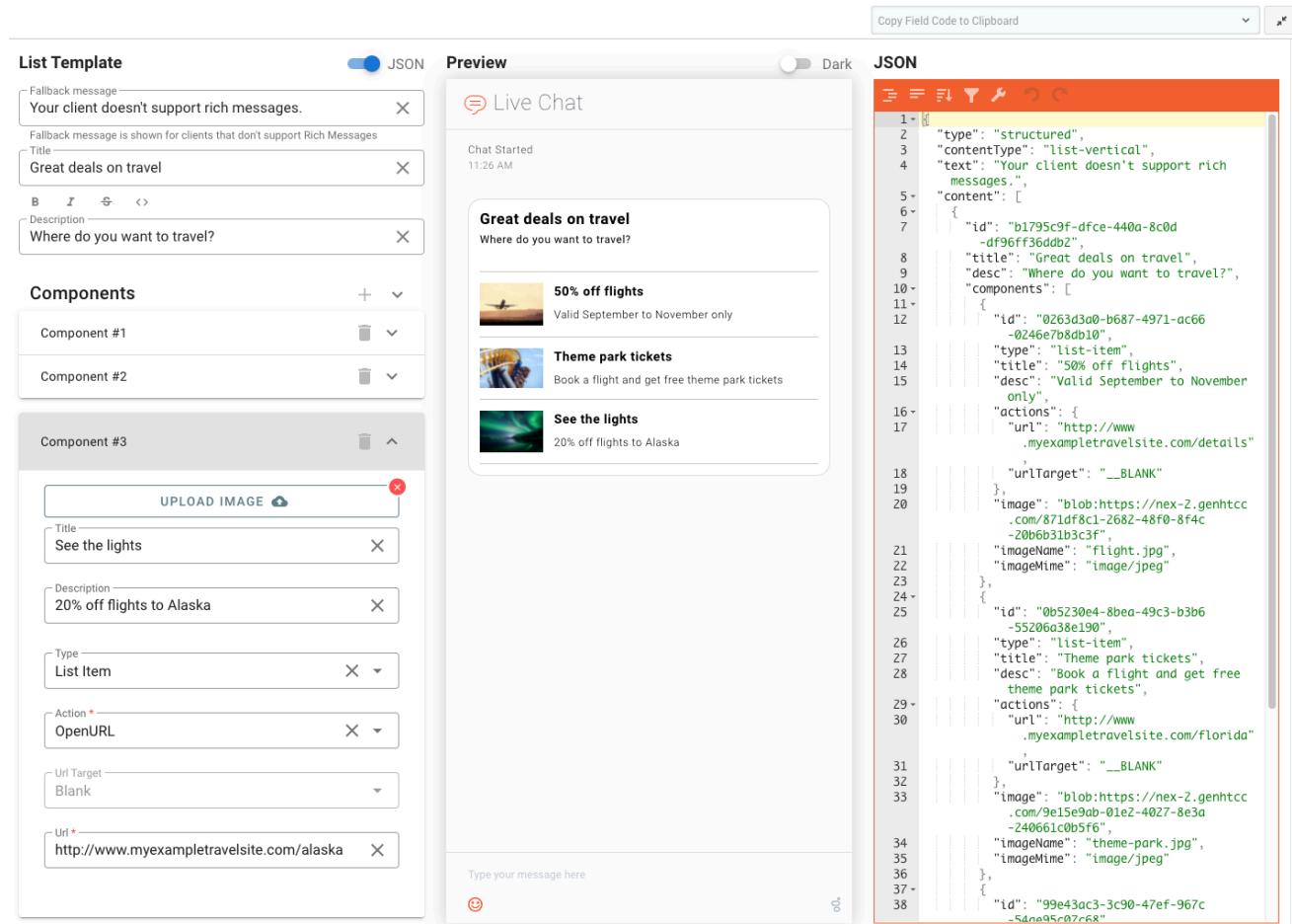
Buttons

In the Buttons section, first choose a type: CallToAction or QuickReply.

For CallToAction, specify the **Button Text** and choose an Action Type: Visit Website or Call Phone Number. If you select Visit Website, provide the **URL** with any necessary parameters. If you select Call Phone Number, provide the **Phone Number**.

You can add up to two buttons, which are displayed below the footer at the bottom of the notification.

List Template responses

A List Template lets you create custom cards with list items made up of an image, text, and clickable area. See List Template for details.

To create a List Template standard response, first define a **Fallback message** to display to users who don't support rich messages. This field is populated by default, but you can adjust it to whatever suits your needs.

Give your List Template a **Title**. You can format text in the **Description** field by highlighting one or more words and click the related button for bold, italic, strikethrough, or code.

Click (＋) to create a component, a clickable list item that is displayed in the response. Give your component and image, **Title**, and **Description** (optional). The **Type** field has two options:
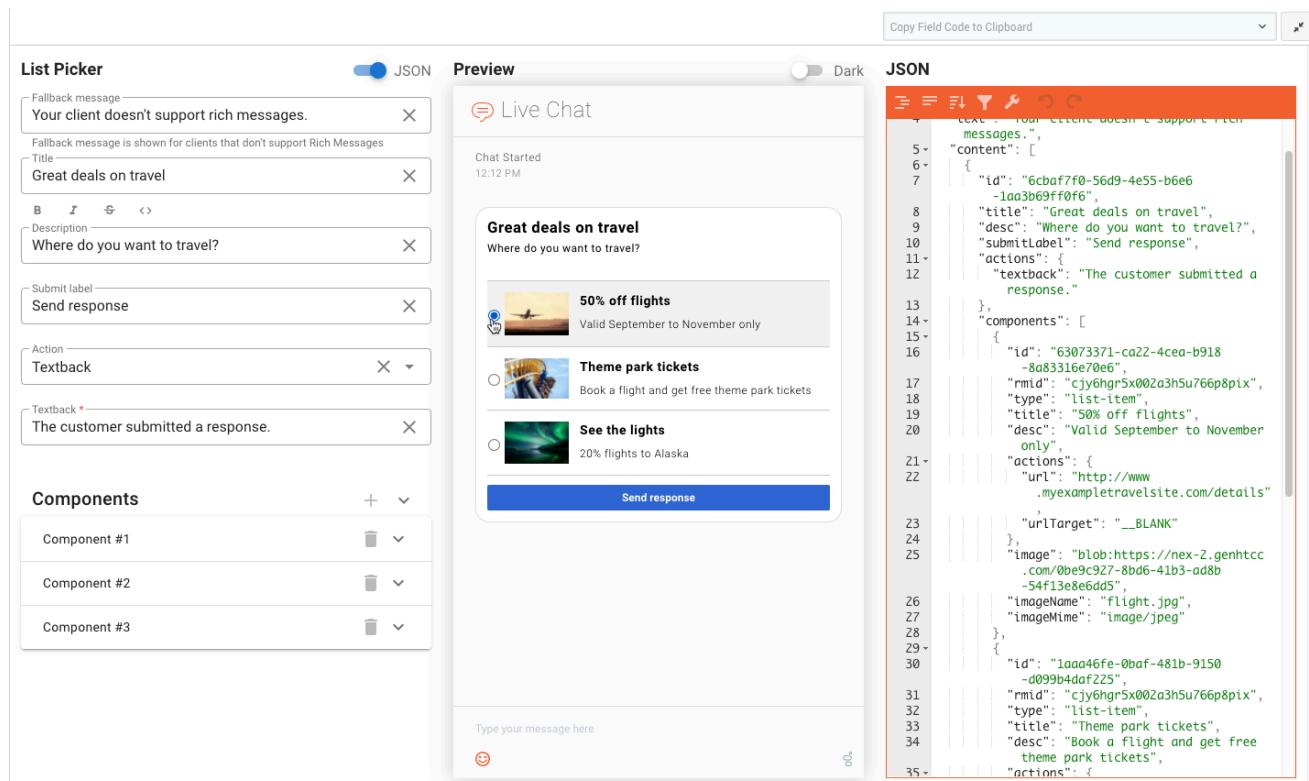
- List Item—The image is displayed to the left of the title and description.

- Big List Item—The component fields are stacked in this order: image, title, description.

You can use combinations of List Item and Big List Item in a single List Template standard response.

Define the action for this clickable list item by choosing from the **Action** drop-down. There are two options:

- OpenURL—Choose this option if you want the click action to open a link. Provide the **URL Target**, which specifies where the link opens. Currently, "Blank" (open in a new tab or window) is supported. Specify the **URL** for the clickable area.

- Textback—Choose this option if you want the click action to send the text in the **Textback** field to the agent when the customer clicks this button.

List Picker responses

A List Picker is similar to a List Template, except that the user can choose an option in the list and submit it to the agent. See Single Selection List for details.

To create a List Picker standard response, review the details in the List Template section. There are just a few differences in the fields for these two types of rich messaging standard responses.

Define the **Submit Label**, which is the text displayed on the submit button. This button appears after the user has chosen one of the list items (do the same in the Preview to see how your buttons look). Also specify which **Action** the button takes: "OpenURL" or "Textback".

Use field codes

You can insert field codes to customize any type of standard response. If the field code you need is not in the list, you can create it using Field Codes Management. Field codes are delimited using syntax. If you type a field code directly into the body of a standard response, then you must enter the delimiters yourself. If you select from the list of field codes, then the delimiters are added automatically.

Characters allowed in names

More Characters Allowed in Object Names

Name	Character	Name	Character
Hyphen	-	Exclamation point	!
Number sign, pound	#	Dollar sign	$
Caret	^	Asterisk	*
Underscore	_	Curly brackets	{ }
Angle brackets		Period, full stop	.
Backslash	\	Parentheses	()
Question mark	?	Space	
At sign	@		

Copy a standard response

You can copy responses from the standard responses table in a category. Just click **Copy** ( ) for the standard response you want to copy and then paste it to the current category.

To copy a standard response to a different category, choose **Paste** from the category's menu.

Important

The copy/paste functionality does not copy any existing standard response history. This history might be present in a standard response if it was originally created using the eServices Manager Plug-in.

Delete a standard response

You can delete standard responses from the responses table view in a category. Just click **Delete** (▮) for the standard response you want to remove.

Search the category tree
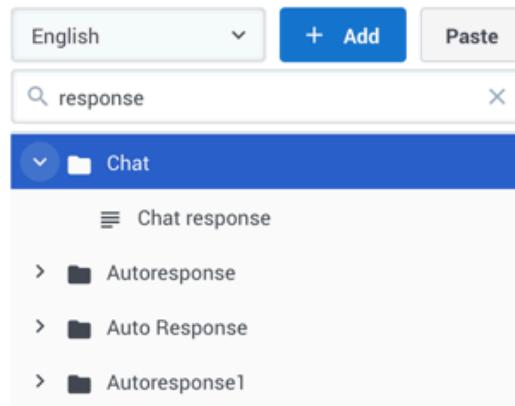
To locate a category or standard response, use the search box above the category tree. The category tree filters automatically based on the search term.

To search for standard responses in a category, use the search box above the responses table. The results filter automatically based on the search term.

Manage field codes

Contents

-

- Administrator

Learn how to create and edit fields codes to use in standard responses.

Related documentation:
-

Field codes are the most complex and powerful aspect of standard responses. With field codes, you can create standard responses that are automatically personalized when they are used.

For example, you can use the field code `Contact.FirstName` in a response beginning `Dear Contact.FirstName`, which you send to dozens of recipients. In each message, `Contact.FirstName` is replaced by the first name of the addressee of the message (the contact) as listed in the Universal Contact Server database.

Field Codes Management enables you to create a wide range of field codes types. The codes can range from simple - similar to a Mail Merge word processor feature - to complex field codes that include multiple objects, formulas, and constants.

Once you create a field code, you can use it in multiple standard responses.

The interface for creating field codes is simple. Creating useful field codes requires a deeper understanding of how they are constructed. Create or edit a field code provides step-by-step instructions, with links to detailed reference information at the relevant places.

Access Field Codes Management under the **Responses** menu.

Field Codes

Name	Description	Text	
Greeting	Greeting for outgoing emails.	Hello +Contact.FirstName!	✎ ▢ 🗑
Customer FullName	Customer's full name.	Contact.FullName	✎ ▢ 🗑
Agent FullName	Agent's full name.	Agent.FullName	✎ ▢ 🗑
Thank You	Thank you message.	QueryTopic	✎ ▢ 🗑

Create or edit a field code

When you create a new field code, the **New Field Code** view opens on the right side of the page. To begin, give your field code a name and brief description.

> ### Important
>
> The field code name can consist of no more than 64 alphanumeric characters supported in UTF-8. For additional valid characters see Characters allowed in names. The following characters combinations are not allowed: "".

Choose system or custom variables to insert into the **Text** field, and add any other necessary text. See Use variables in field codes for details about variables and how to use them. If the custom variable you need is not in the list, you can create it using Custom Variables Management.

For detailed help with constructing the field code, see Use formulas in field codes.

See Examples for more about using complex field codes.

Use variables in field codes

The ability to access interaction data is perhaps the most frequent use of field codes. Although field code formulas can be complicated, many just retrieve a single piece of data, such as a contact's name.

You access Universal Contact Server data using predefined variables, called "system variables."

These variables access three predefined objects. Each object has a name and a set of properties. Let's use `Contact.FirstName` as an example. `Contact` is an object and `FirstName` is one of its properties. The system variable `Contact.FirstName` retrieves the value of the `FirstName` property of the `Contact` object.

Similarly, there is a system variable for each `object+property` pair. You can use the following objects in field codes:

- Agent object - Information about the agent, such as name and signature.

- Contact object - Contact details such as name, address, and phone number.

- Interaction object - Information about the interaction, such as created date, to and from address, and attached data.

Use your own data

It is possible to incorporate data that you keep external to Universal Contact Server into your standard responses (including automated responses). This data could include case numbers, account information, and so on. Remember that attached data always consists of key-value pairs.

Follow this two-step process to use external data:

1. Retrieve the external information and add it to the interaction as attached data. One place to do this is in a Designer application.

2. Now that you have attached the data to the interaction, use the `AttachedData` property of the Interaction object to access the data. The `AttachedData` property requires one argument, which is the key name. The result of the following formula is the value associated with the `OrderStatus` attached-data key: `Interaction.AttachedData("OrderStatus")`

Use formulas in field codes

In addition to system variables such as `Contact.FirstName`, field codes contain formulas. This section provides an outline of formula usage. Find details about these topics in the Field Codes Reference Guide.

Field code formulas are similar to formulas in other applications, such as Microsoft Excel.

A *formula* is a sequence of one or more operands (such as numbers and text strings), separated by operators (such as + and -).

For example, in the following formula, 2 and 3 are operands and + is an operator: 2 + 3

Operands can be values that do not change (constants), or values that vary based on the context. In the previous formula, all the operands are constants, so the formula always evaluates to 5. The next formula evaluates to a different value for each agent who uses it: `Agent.Signature`

Field Code Syntax

To summarize field code syntax:

- Enclose alphabetic strings, whether constants in formulas or elsewhere in a field code, in double quotes.

- Numeric constants require no special treatment.

- Use special characters for some purposes. For example, for your field code to render with a line break, you cannot just type a carriage return. Instead, you must insert the expression \n. See the Escape Sequences table in the *Field Codes Reference Guide*.

HTML in Field Codes

With special configuration, field codes can contain HTML markup; for example, you could have a field code that uses a custom variable with a default value of:

```
Sam Agent

Acme Products

29 Exterior Blvd

Springfield, CX 09090
```

To enable this, you must use the Java property `-Dsrl-field-code-allow-html=true`, in one of the following ways:

- Add it to the JavaArgs section of `ContactServerDriver.ini`

- Add it as an argument to the startup command line in `contactServer.sh`.

Operator Precedence

If you use more than one operator in a formula, the order in which they are evaluated depends on their relative *precedence.* Higher precedence operators are evaluated first. For example, multiplication (*) has a higher precedence than addition (+), so that the formula below evaluates to 14, not 20:

```
2 + 3 * 4
```

You can use parentheses to override the default precedence. The formula below evaluates to 20:

```
(2 + 3) * 4
```

For a complete list of operators and their relative precedence, see Operator precedence in the *Field Codes Reference Guide*.

Data Types

Operands of several different types may appear in formulas:

- Number

- String (text)

- Date/time

- Boolean (true/false)

- Object (Contact, Interaction, and Agent)

Each data type behaves differently in formulas, and the operators have different meanings when you use them with different data types. For example, the + operator means "add" when used with numbers, but "concatenate" (paste together) when used with strings. This formula evaluates to *Uncle Sam Wants You*:

```
"Uncle Sam " + "Wants You"
```

You can't use some operators with some data types at all. For example, you cannot use the multiplication (*) operator on two strings.

Genesys converts all formulas, regardless of their final data type, to strings before merging them into your standard response. This conversion follows a set of default rules that depend on the data type. For example, the default rules for numbers round them off to integers. This formula inserts 2 into your standard response, even though the real result is 2.25:

```
9 / 4
```

You can use the Text function or format operator (:) to override the default formatting. Either of the following formulas inserts 2.25 into your standard response:

```
Text(9 / 4, "#.##")
```

```
(9 / 4):"#.##"
```

For a detailed list of data types and how you can use them, see Data types in the *Field Codes Reference Guide*.

Functions

When composing formulas, you can use many built-in functions. *Functions* are predefined formulas that perform calculations using values, called *arguments,* which you supply. To use a function, write its name, followed by an opening parenthesis, the arguments for the function separated by commas, and a closing parenthesis.

Function arguments can be of any data type, although individual functions can place restrictions on their arguments. Function arguments can be constants or formulas. The Length function, for example, takes a single string argument and returns its length in characters. This formula evaluates to 13:

```
Length("Hello, world!")
```

As another example, the Date function takes individual date components (year, month, day, and so on), and constructs a date/time value. The formula below evaluates to 1965-11-23 09:03:10:

```
Date(1965, 11, 23, 9, 3, 10)
```

Functions can act as arguments to other functions. The WeekdayName function takes a single date/

time argument and returns the day of the week as a string. The formula below evaluates to Tuesday:

`WeekdayName(Date(1965, 11, 23, 9, 3, 10))`

This formula evaluates to 7:

`Length(WeekdayName(Date(1965, 11, 23, 9, 3, 10)))`

For detailed descriptions of all available functions, see the following topics in the *Field Codes Reference Guide*:

- String functions
- Date and time functions
- Type conversion
- Mathematical functions
- Miscellaneous functions

Using Objects

All object/property pairs are available in the system and custom variables menus.

Object properties can be of any data type. `Agent.FullName`, for example, is a string, but `Interaction.DateCreated` is a date/time.

The data type of an object property can even be another object. For example, `Contact.EmailAddresses` yields another object called a `ContactEmailAddressList`. You can access the properties of the resulting object by entering a period (.), followed by the property name, just as before. The formula below evaluates to the number of email addresses assigned to the contact:

`Contact.EmailAddresses.Count`

Some object properties require arguments just as functions do. For these properties, write the arguments, enclosed in parentheses after the property name, just as before.

For example, the ContactEmailAddressList object has a property named `Exists`. You can use this property test whether a contact has a particular email address. The data type of this property is Boolean (true/false), and it takes one argument, the email address to test.

`Contact.EmailAddresses.Exists("samd@acme.com")`

For detailed descriptions of all objects and their properties, see the following topics in the Field Codes Reference Guide:

- Agent object
- Contact object
- Interaction object

Examples

The following is an example of a complex field code:

```
If (Time() - Interaction.DateCreated > 14, "Please accept our apologies for not
having replied sooner. ", "")
```

This field code inserts a tardiness apology if more than 14 days have elapsed since the interaction first entered the system. It uses the function `If`, which has these properties:

- Its syntax is `If (Boolean, TrueResult, FalseResult)`
- If Boolean evaluates to `True`, it returns the second argument.
- If Boolean evaluates to `False`, it returns the third argument.

In this example, the three arguments of `If` are as follows:

1. `Time() - Interaction.DateCreated > 14` A formula that returns `True` if the difference between the date created and the current system time is more than 14 days. (A mathematical operation on dates returns a result in days.)

1. "Please accept our apologies for not having replied sooner." A text string apologizing for tardiness, inserted if the formula evaluates to `True`.

2. The null string: if the reply is not late (the formula evaluates to `False`), nothing is inserted in it.

Copy a field code

You can copy an existing field code with the **Copy** button (⧉). This opens the **New Field Code** view with the copied information. The name of the field includes "_N", where "N" is the number of the copy. For example: Greeting_1, Greeting_2, and so on.

Delete a field code

To delete a field code, just click the delete icon (🗑).

Search for a field code

To search for a field code, use the search box above the table. The results filter automatically based on the text you enter in the search box.

Characters allowed in names

Additional Characters Allowed in Object Names

Name	Character	Name	Character
Hyphen	-	Exclamation point	!
Number sign, pound	#	Dollar sign	$
Caret	^	Asterisk	*
Underscore	_	Curly brackets	{ }
Angle brackets		Period, full stop	.
Backslash	\	Parentheses	()
Question mark	?	Space	
At sign	@		

Manage custom variables

Contents

-

- Administrator

Learn how to create and edit custom variables to use in standard responses.

Related documentation:

-

Use Custom Variables Management to create custom variables to use in field codes. Custom variables have the following properties:

- Their values are assigned by strategy objects.
- Standard responses that use field codes containing custom variables must have the usage type Acknowledgment.

Access Custom Variables Management under the **Responses** menu.

Custom Variables

Name	Type	Default Value	
CV_DateTime	String	2021-01-06T14:43:01.700Z	✏ 🗐 🗑
CV_Double	Double	0.9999	✏ 🗐 🗑
CV_String	String	String	✏ 🗐 🗑
CV_Int	Integer	101	✏ 🗐 🗑
CV_Name	String	Default Value	✏ 🗐 🗑

Create or edit a custom variable

When you create a new custom variable, the **New Custom Variable** view opens on the right side of the page. To begin, give your variable a name and brief description.

The custom variable name can consist of no more than 64 alphanumeric characters (a-z, A-Z, 0-9) and underscore.

Choose the **Type** of custom variable and add a default value that corresponds to the type. If you choose DateTime, use the calendar widget to select a default date and time or enter your own value in this format: "yyyy-MM-ddTHH:mm:ss.SSSZ".

Copy a custom variable
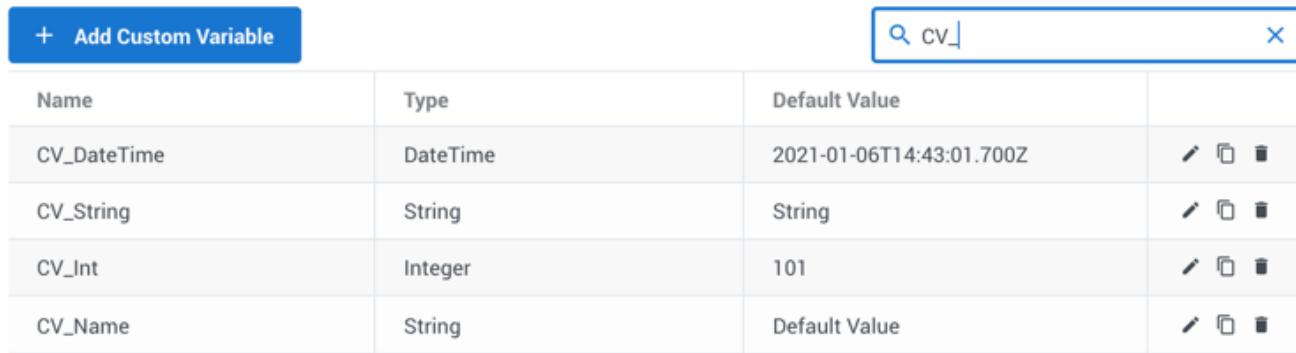
You can copy an existing variable with the **Copy** button ( ). This opens the **New Custom Variable** view with the copied information. The name of the variable includes "_N", where "N" is the number of the copy. For example: CV_DateTime_1, CV_DateTime_2, and so on.

Delete a custom variable

To delete a custom variable, just click the delete icon (🗑).

Search for a custom variable

To search for a custom variable, use the search box above the table. The results filter automatically based on the text you enter in the search box.

+ Add Custom Variable		Q CV_	✕
Name	Type	Default Value	
CV_DateTime	DateTime	2021-01-06T14:43:01.700Z	✎ 📋 🗑
CV_String	String	String	✎ 📋 🗑
CV_Int	Integer	101	✎ 📋 🗑
CV_Name	String	Default Value	✎ 📋 🗑

Manage API keys

Contents

Learn how to manage API keys for Digital Channels.

Related documentation:
  •

Digital Channels allows management of chat and secure mail API keys. You can add or revoke API keys.

Access API Keys under **Provisioning** menu.

The following user rights are required to manage the API keys:

- `Nexus.ApiKeys.canView` and `Nexus.ApiKeys.canRead` - to view the API Keys page
- `Nexus.ApiKeys.canCreate` - to create new API keys
- `Nexus.ApiKeys.canUpdate` - to update an existing API key
- `Nexus.ApiKeys.canDelete` - to delete an existing API key

Create or edit an API key

To add a new API key, click **Add API Key**.

When you create a new API Key, the **New API Key** view opens on the right side of the page. To begin, give your API key a name and a permission it can use. You can choose either *Secure Mail* or *Chat*. The permission cannot be changed later.

The API key is enabled by default. If you want to disable it when creating the key, toggle the **Enabled** option ( ).

If you want the API key not to expire, select the **Will never expire** option. Alternatively, if you want to set an expiration date for the API key, clear the **Will never expire** option and choose a date in the **Expiration Date** option.

Enable an API key

To enable an API key, toggle the **Enabled** option (⬤) from the API keys listing or from the **API Key Details** view.

Expire an API key

To expire an API key, clear the **Will never expire** option and choose a date in the **Expiration Date** option.

If a key is expired, the **API Key Details** view displays the date and time when the key expired.
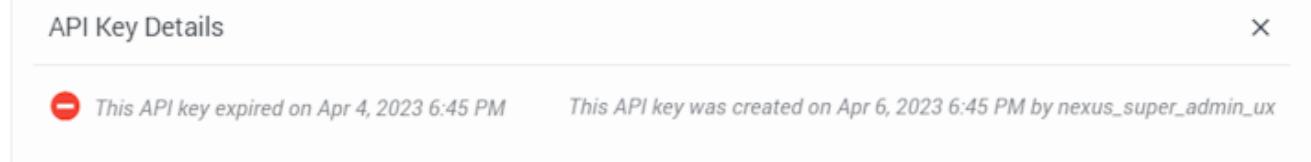
If you want to extend the expiry date, select a new date in the **Expiration Date** option.

Delete an API key

To delete a key, just click the delete icon (🗑). If you just want to disable the API key temporarily, consider changing the key's enable option instead.

Copy an API key

You can copy an existing API key with the **Copy** button (⧉). This opens the **New API Key** view with the copied API information. The name of the API key includes "_*N*", where "*N*" is the number of the copy. For example: *APIKEYtest_1*, *APIKEYtest_2*, and so on.

Find an API key

To search for an API key, use the search box above the table. The results filter automatically based on the text you enter in the search box. You can search for an API key name or the person who created the key.

You can filter the available API keys by:

- **Status** - *Available* (keys that are not revoked or expired), *Unavailable* (keys that are revoked or expired), and *Soon Unavailable* (keys that will be revoked or expire withing a month). Click on the button to toggle displaying the keys matching the selected option.

- **Permissions** - Choose either *Secure Mail* or *Chat* from the dropdown to list keys that match the selected permissions.

Tenant Settings

Contents

Learn how to use the Tenant Settings UI to configure your Digital Channels deployment.

Related documentation:

-

The user interface (UI) for Tenant Settings is simple: a table of settings with descriptions, default values, and user input areas. As an administrator, you can configure settings in two ways:

1. Check **Use System Default**.

2. Uncheck **Use System Default** and provide your own values.

The settings are fully described in the UI, including details about valid values and how any related features and applications behave when the value is changed.

Access Tenant Settings under the **Provisioning** menu.

Edit a setting

To specify a setting value, either type in the appropriate text box, use the toggle to turn settings on and off, or select from the drop-down list. Any existing default values are listed below the value input area.

The **Cancel** and **Save** buttons are disabled until you make a change on the page. After you save a setting, it takes effect within 10 minutes.

Tenant Setting options

Section	Setting Name	Description
Contacts	Additional trusted attributes	Array of additional trusted attributes used in contact identification.
	Additional untrusted attributes	Array of additional untrusted attributes used in contact identification.
CORS	Allowed Origins	Allow list of trusted domains.
Longpoll mode	Inactivity timeout	If Nexus does not receive a new longpoll request from the Genesys Widget within this timeframe, it will treat the client as disconnected.
Async hold queue	Enabled	When enabled, agents will be prompted to accept chats from subscribed contacts prior to those interactions being directed to a Designer routing application. When disabled, chat interactions bypass this step and are directed immediately to the Designer application for routing.
	Routing delay	The time that an interaction will attempt to be routed to an agent who is subscribed to the contact before being directed to the Designer routing application. Applies only if subscribed agents for the contact are online.
Session expiration	Chat session expiration	Specifies the time a chat session without any activity will be stored.
	Anonymous chat session expiration	Specifies the time an anonymous chat session without any activity will be stored. A chat session is considered anonymous when the customer does not provide a trusted contact attribute such as

Section	Setting Name	Description
		email address or phone number.
Undelivered interactions	Queue name	Name of the queue to submit undelivered interactions to. If not set, Nexus will submit to predefined 'undelivered' queue.
	Storing duration	Time duration to keep undelivered interactions in the 'undelivered' queue.
Limits	Maximum message length	Number of characters allowed in a single message.
Webhooks	Excluded userdata	Array of prefixes for userdata keys to be excluded before API response delivery.
Bots	Maintain bot session contexts	When turned on, preserve output contexts and use them as input on the next turn. Applicable to Dialogflow ES only.
	Contexts Policy	Determines how user-provided bot contexts should be merged with existing session contexts. Possible Values are: • **Initialize** - use input only if existing contexts are not present • **Add** - add only those input contexts which do not exist • **Replace** - add or completely overwrite an existing context with input • **Merge Soft** - merge existing parameters with request data, on conflict – keep existing • **Merge Hard** - merge existing parameters with request data, on conflict – set new values from the request • **Reset** - clear all contexts (and ignore what contexts were provided)
	Barge-in: enabled	Barge-in: when turned on, barge-in configuration will be passed on each request to the bot. Applicable to Dialogflow CX only.
	Barge-in: recorded audio header size	Barge-in: the number of bytes to retrieve from pre-recorded audio prompt to examine duration.

Section	Setting Name	Description
		Applicable to Dialogflow CX only.
	Barge-in: recorded audio header fetch timeout	Barge-in: the maximum number of milliseconds to complete retrieval of pre-recorded audio prompt header. Applicable to Dialogflow CX only.
Social Profile/Message URL templates	Facebook Post URL template	URL template to construct the link to a Facebook post.
	Facebook Comment URL template	URL template to construct the link to a Facebook 1st level comment.
	Facebook Comment Reply URL template	URL template to construct the link to a Facebook 2nd or 3rd level comment.
	Twitter Profile URL template	URL template to construct the link to user's Twitter profile.
	Twitter Message URL template	URL template to construct the link to a Twitter message.
Nexus UX options	Show links to user's native social profile	When enabled, the link to user's native social profile will be shown in Nexus UX for every social message.
	Show links to user's native social message	When enabled, the link to user's native social message will be shown in Nexus UX for every social message.
	Allows to enable or disable agent to send attachments	When enabled, agents will be able to send attachment to all chat and social sessions.
	Allows to enable or disable markdown editor in Nexus UX	When enabled, agents will be able to switch to markdown editor and create messages with markdown in Nexus UX
	Allows to enable or disable nickname to represent the agent in conversation	Allows to replace first name/last name representing the agent by nickname in conversation/ communication view.
	Enable UTF-8 encoding for counting sms chars	Enable UTF-8 encoding for counting SMS characters in text field (instead of default GSM or UTF-16 encoding).
	Enable Update Contact Information button	Enable Update Contact Information button for retrieving new contact attributes from UCS.
Contacts	Supported languages	Array of supported language codes in ISO2.
	Default language	Default language code in ISO2.
Chat	Chat session mode	Array of supported chat modes.

Section	Setting Name	Description
		Possible Values: • **Standard** - use standard nexus session mode • **Async** - use async nexus session mode
	Disable subscription for sub medias	Array of sub-media types that will not trigger an agent subscription to a contact after accepting an interaction. Possible values are: • **Facebook Private** - FacebookPrivate sub-media • **Facebook Public** - FacebookPublic sub-media • **SMS** - SMS sub-media • **Twitter Private** - TwitterPrivate sub-media • **Twitter Public** - TwitterPublic sub-media • **WebChat** - WebChat sub-media • **WhatsApp** - WhatsApp sub-media
	Default timezone offset for session (in minutes)	Specifies the timezone offset value for the session in minutes. e.g. GMT+2 will be specified by the value 120, GMT-5 is represented by value -300. Value 0 has specific meaning - timezone is omitted, considered to be GMT. Specified value must be in range of -720 to 720.
Privacy	Privacy Rules Scope in History API	Determines scope of privacy rules that applied to data returned via History API when data are extracted. Possible values are: • **None** - No masking is happening when data is extracted via History API (if some masking happened on the early stages it will be kept).

Section	Setting Name	Description
		• **History** - History scope rules are applied. • **Agent** - Agent scope rules are applied.
	Privacy Rules Scope in Consumer Messaging API (retrieving transcript for interaction)	Determines scope of privacy rules that applied to data returned via Consumer Messaging API when data are extracted for particular interaction (only GET /chat/sessions/{sessionId}/interactions/{interactionId}) Possible values are: • **None** - No masking is happening when data is extracted via Consumer Messaging API (if some masking happened on the early stages it will be kept). • **History** - History scope rules are applied. • **Agent** - Agent scope rules are applied.
	Store typing events into UCS transcript	When enabled, the typing events (started/stopped) are stored in UCS transcripts for interactions.
	Return TypingStarted/Stopped events in history API	When enabled, typing events (started/stopped) are returned in response of History API calls.
	Disable typing preview feature	When enabled, text typed by the customer is not stored in the system.
Rich Media Authoring Tool	Allow rich media creation	When enabled, users can create rich media responses with types listed in 'Allowed rich media types' option.
	Allowed rich media types	Rich media types that are allowed to be created by users in Standard Responses UI. Possible values are: • **Carousel** - used to create multiple rich messages that users can navigate through using look-left and look-right arrows • **Generic Template** - used to

Section	Setting Name	Description
		create custom cards with an array of different components like buttons, links, and text
		• **List Picker** - similar to a List Template, except that the user can choose an option in the list and submit it to the agent
		• **List Template** - used to create custom cards with list items made up of an image, text, and clickable area
		• **Media Notification** - corresponds to WhatsApp Message Templates, but can be used anytime when there is a need to send structured, predefined information to the customers
		• **Quick Reply** - used to send a predefined reply to an agent or bot in a chat session
		• **Text Notification** - used to create a simple text notification without images or any controls

Manage SMS Keywords

Contents

Learn how to manage SMS keywords to send responses to inbound SMS received

Related documentation:

  -

Access Keywords from the **Admin** menu.

Keyword Groups (MO)

Name	Match	Reply Message (MT)	
📌 help	could you clarify?, can you help?, please, help me	help is coming, please stand by	✏ 🗅 ×
📌 opt out	stop sending messages, do not send messages anymore	no more messages will be sent, sorry for bothering you	✏ 🗅 ×
📌 opt in	Cluster options will be applied	Cluster options will be applied	✏ 🗅 ×
📌 catch all		agent will join soon	✏ 🗅 ×
special customer	i have a special customer card, special card, \d{3,3}_\d{3,3}_\d{3,...	ok, opening access to special customer menu	✏ 🗅 🗑
tariff change	change tariff	sending tariff plans	✏ 🗅 🗑
credit card	\d{4,4}-\d{4,4}-\d{4,4}-\d{4,4}	credit card data will be masked in logs	✏ 🗅 🗑

There are four pre-configured keyword groups to help creating keyword groups:

  - help
  - opt out
  - opt in
  - catch all - This keyword is used to respond when none of the keyword groups match the incoming message.

Create or edit a keyword group

To add a new keyword group, click **Add Keyword Group**. When you create a new keyword group, the **New Keyword Group** view opens on the right side of the page.

Provide the following information

- **Name** to identify the keyword group
- Define the match criteria (*Text* or *Regex*):
  - Click **Add new match**
    - If you want to match on a pre-defined keyword, choose *text* as the match type and enter the

keyword in the **Value** pop-up.

- If you want to match on a regular expression (regex), choose *Regex* as the match type and enter the expression in the **Value** pop-up.

- **Reply Message (MT)** - Configure the message that will be sent if the incoming message matches the rules.

Copy an existing keyword group

You can copy an existing keyword group with the **Copy** button and modify it to suit your needs.

Delete a keyword group

To delete a keyword group, just click the delete icon .

Search for a keyword group

To search for a keyword group, use the search box above the table. The results filter automatically based on the text you enter in the search box.