



Digital Channels Administrator's Guide

Integrate with Genesys Hub

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- Administrator

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

Related pages:

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

Important

Contact your Genesys representative to get access to Genesys Hub.

Set up your account



Setup your Social Engagement Software

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

[Continue](#)

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

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

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

Set up Twitter: Create a Twitter account channel

The screenshot displays the Genesys HUB interface. On the left, a sidebar contains navigation options: CHANNELS (My Channels), ACCOUNT (My Account, Users, Groups, My Profile), and a 'Create' button. The main area shows the 'New Channel' form with fields for Channel Type, Channel Name, and Description. Below the form is a 'Create' button. A 'Login to Twitter' button is located below the 'Create' button. An arrow points from the 'Login to Twitter' button to a browser window showing the Twitter authorization page. The browser window displays the URL <https://api.twitter.com/oauth/aut> and the text 'Authorize Genesys Social Engagement. to use your account?'. The page includes a Twitter logo, the Genesys Social Engagement logo, and a form with fields for 'Username or email' and 'Password'. There are also checkboxes for 'Remember me' and a link for 'Forgot password?'. At the bottom of the form are 'Authorize app' and 'Cancel' buttons.

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

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

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

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

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

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

Set up Twitter: Create a Twitter service channel

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

- Channel Type ***: Dropdown menu set to 'Twitter : Service'.
- Channel Name ***: Text input containing '@Genesys - Twitter Service'.
- Description**: Text area containing 'This channel monitors Twitter mentions around the the @Genesys handle'.
- Languages ***: Tagged buttons for 'English' and 'Spanish'.
- Keywords ***: Tagged button for '@Genesys'.
- Advanced**: Section header with a right-pointing arrow.
- Skip Retweets**: Radio button selection with 'Yes' selected and 'No' unselected.
- Twitter Handle(s) ***: Text input containing '@Genesys'.

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

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

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

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

Best practices for managing keywords in Twitter service channels

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

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

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

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

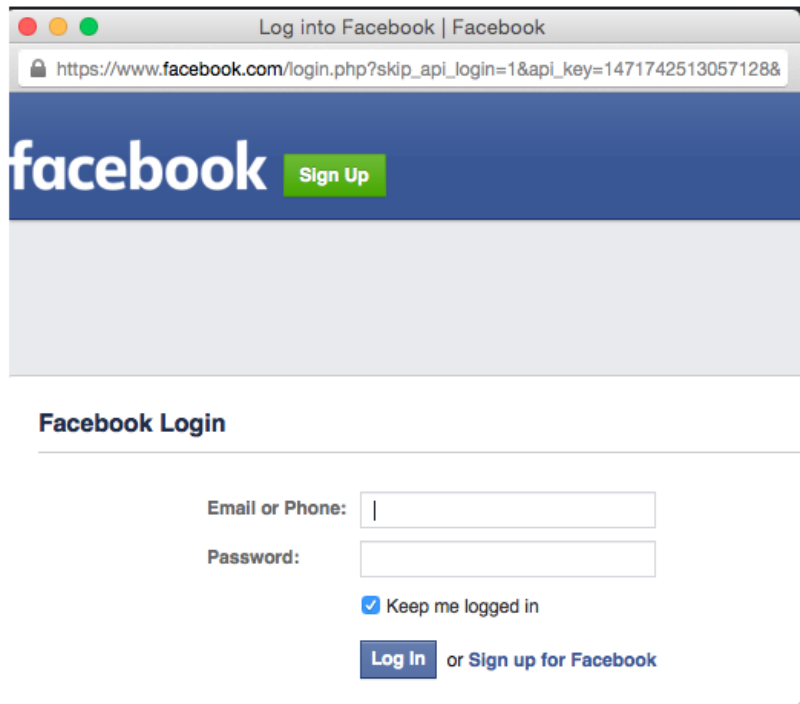
Set up Facebook: Create a Facebook account channel

Update Channel

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

Authorise Social account

 Login to Facebook



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 are logged into Facebook with the same browser you're using for this setup.

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

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


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

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

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

Set up Facebook: Create a Facebook service channel

Update Channel

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	<input type="checkbox"/>

Update & proceed →

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



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

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

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

Set up WhatsApp: Create a WhatsApp service channel

[←](#) Update "WhatsApp Doc" Channel

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

Update

Initiate

Create a WhatsApp service channel to communicate with your customers.

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

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

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

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

Set up WhatsApp: Register a WhatsApp service channel

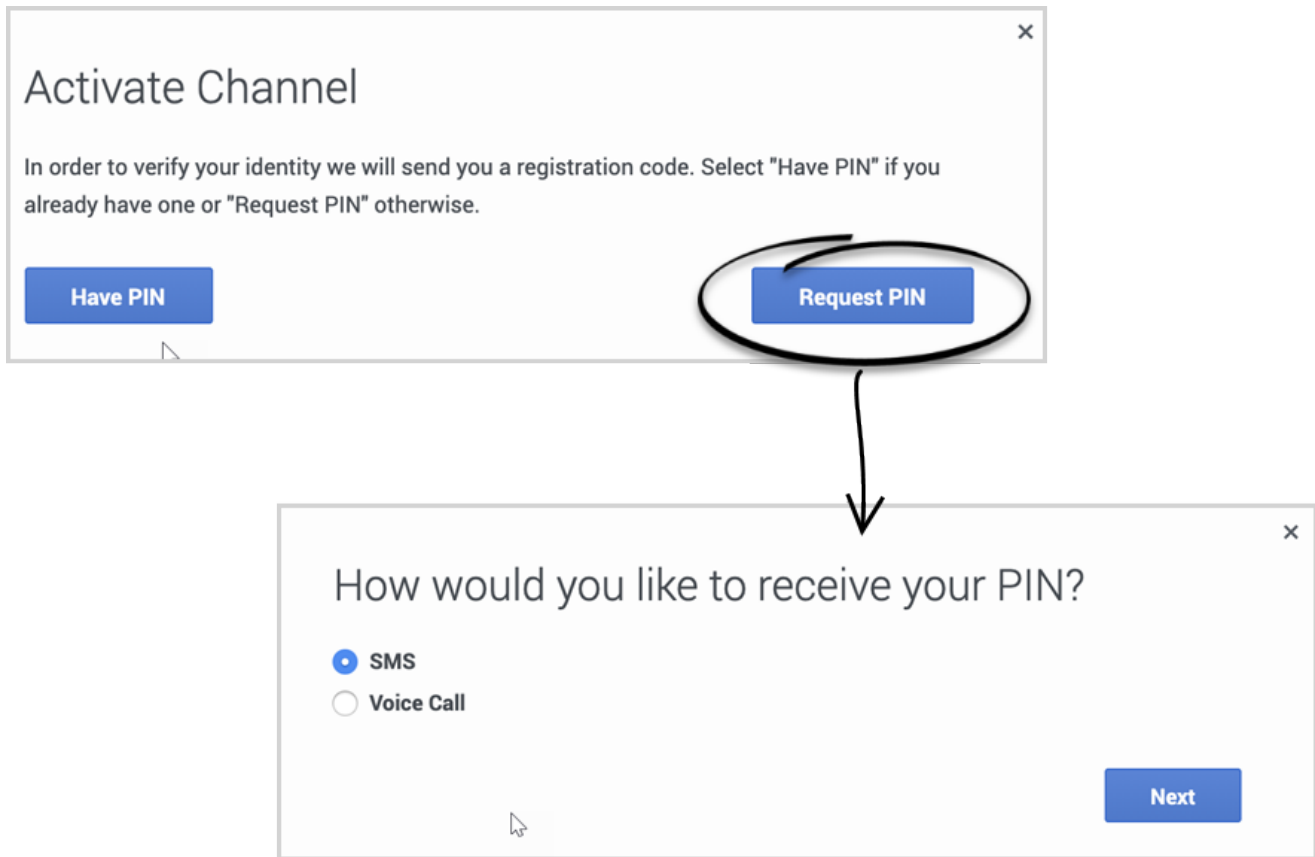
Register your channel by sending a request to Genesys. The Genesys team verifies, provisions and configures all the required infrastructure for your business contact number to function and service your consumers. **Note:** After registering, you must contact your Genesys representative if you want to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

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

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

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

Set up WhatsApp: Activate a WhatsApp service channel



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

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

Create an administrator user for the account

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

- First name ***: Input field with placeholder 'First name'.
- Last name ***: Input field with placeholder 'Last name'.
- Email ***: Input field with placeholder 'Only one email per account allowed'.
- Roles ***: Dropdown menu with 'ADMIN' selected.
- Groups**: Dropdown menu with 'FB_ACC Review Team' selected.

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

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

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

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

Production toggle

The screenshot shows the Genesys HUB interface. The top navigation bar includes 'Genesys HUB', 'My Channels', 'System Status', and 'Jobs'. The left sidebar has 'CHANNELS' with 'My Channels' selected, and 'ACCOUNT' with 'My Account', 'Users', and 'Groups'. The main content area is titled 'Update "FB_ACC" Channel'. It contains four fields: 'Channel Type' (Facebook), 'Channel Name' (FB_ACC), 'Production mode' (a toggle switch currently in the 'off' position, circled in red with an arrow pointing to a confirmation dialog), and 'Channel status' (Active). The confirmation dialog, titled 'Confirm switching to production mode', asks 'Are you sure you want to switch this channel to production mode?' and provides a text input field for email recipients, with 'Dismiss' and 'Confirm' buttons at the bottom.

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

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

Note the following:

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