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Genesys Engage On-Premises Use Cases

Genesys Social Media Routing (CE19) for Genesys Engage on premises

4/28/2026

> **Important**
> The PS material for this use case has not been finalized. Please contact your local CSD for effort estimates and scope details of this use case.

Engage with your customers through social channels

What's the challenge?

As the volume of social network interactions continues to escalate, it’s clear that simply throwing more people onto Twitter and Facebook is not a sustainable solution — there needs to be a new evolution to a scalable model for managing social engagement.

What's the solution?

Monitor your business presence on relevant social media sites and easily identify and prioritize online comments. Automatically routing social media interactions across the enterprise to the right people brings new levels of scalability, consistency and responsiveness in your social media interaction strategies.

Other offerings:

PureConnect

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Use Case Overview

Story and Business Context

This functional use case enables companies to use Genesys Social Engagement to provide a consistent customer service experience across social media sites.

Use Case Benefits*

The following benefits are based on benchmark information captured from Genesys customers and may vary based on industry, lines of business or Genesys product line:

Use Case Benefits	Explanation
Improved Customer Experience	Provide consistent CX across social networks by providing agents customer info and social context.
Improved Employee Utilization	Deliver interactions to the best available resource with escalation to other channels when needed.
Improved First Contact Resolution	Improved First Contact Resolution by routing interactions to an expert through skill-based routing.
Increased Revenue	Increase revenue and reduce customer churn with improved resolution of business outcome.
Reduced Administration Costs	Eliminated manual monitoring/reporting by automating efforts through Genesys Social Engagement

Summary

Consistently provide customer service across Twitter and Facebook by delivering interactions to the best available resource with social media public and private messaging. Agents are able to advice customers based on customer information and social media context. Standard responses enable your agents to provide consistent response to customers engaging via Facebook or Twitter.

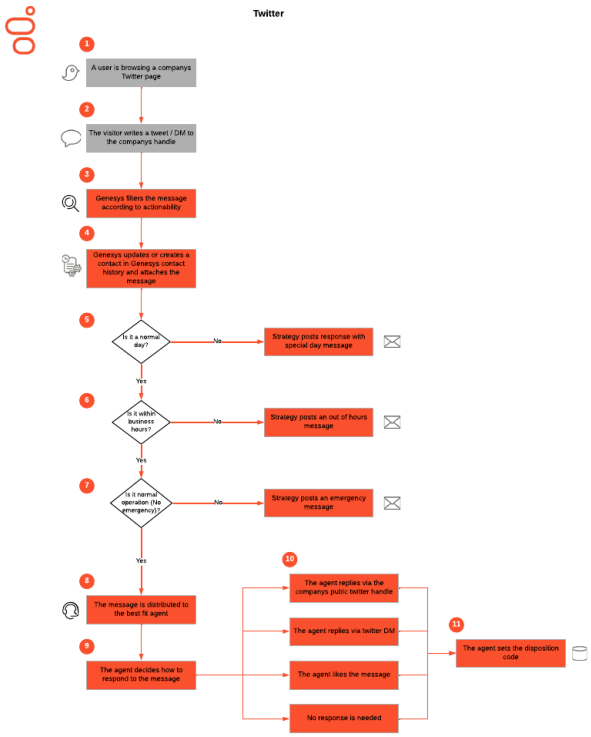
Use Case Definition

Business Flow

(1) Business Flow - Twitter / Facebook Message

The following flows describe the use case from the perspective of the main actors, i.e. social media user and contact center agent.

The first flow shows how a Twitter message is handled:



Business Flow Description

1. The user searches in Twitter/Facebook for the company's handles. User will post/tweet to the attention of the company, by posing a customer care issue.
2. User will post/tweet to the attention of the company, by posing a customer care issue.
3. Genesys monitors the Twitter/Facebook handles via predefined events and filters the message using keywords to determine actionability.
4. Genesys verifies if a corresponding contact already exists in Genesys Contact History. The customer will be identified in the contact history by his Facebook / Twitter handle (if available)
    - If a contact does not exist (social handles are not associated to a registered user), Genesys creates a contact in the Universal contact database based on the customer data. Any following messages and agent replies are stored under this customer.
5. Genesys verifies if the day is a normal operational day. If not, a special day message can be sent stating that the message will be answered once the service is back online. The special day message can be sent either publicly or in private mode.
6. Genesys has the ability to determine if the operating hours of the service match the current time and day. If not, a standard message will be sent in response stating that the message will be answered once the service is back online. This message can be sent either publicly or in private mode.
7. In addition, it is possible to define an emergency message that will be sent once the emergency process is activated. If the emergency setup is invoked, then the system can answer with some emergency message either publicly or in private mode.
8. Genesys will search for an available agent with the correct skills.
    - If an agent is available, the interaction is

routed to an agent.

- If no agent is available, the interaction is queued until an agent becomes available

9. The interaction is sent to the agent for appropriate response.
10. The agent will decide if the interaction requires private comments.
    - If no private answer is required, he will reply via the company facebook page or company's twitter handle
    - If private messaging is required, the interaction will be moved out of the public comment space and will be dealt with via private messaging (Twitter DM/ FB messenger. See separate flow for FB messenger)
        - Best practice for the agent is to respond to a public message with a public response, indicating that the conversation might be moved to private.
    - The agent also has the ability to simply “like” the user comment, if this was considered as positive and no specific answer required.
    - Otherwise, no further action is taken.
11. When the interaction is finished the agent can set a disposition code to register the outcome for reporting purposes.

Business Flow

(2) The next flow shows the handling of a Facebook message:

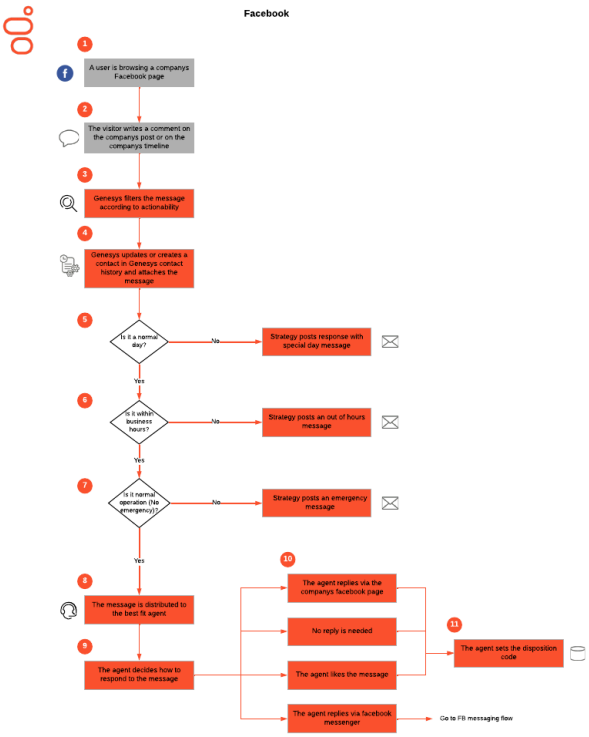
Business Flow

(3)

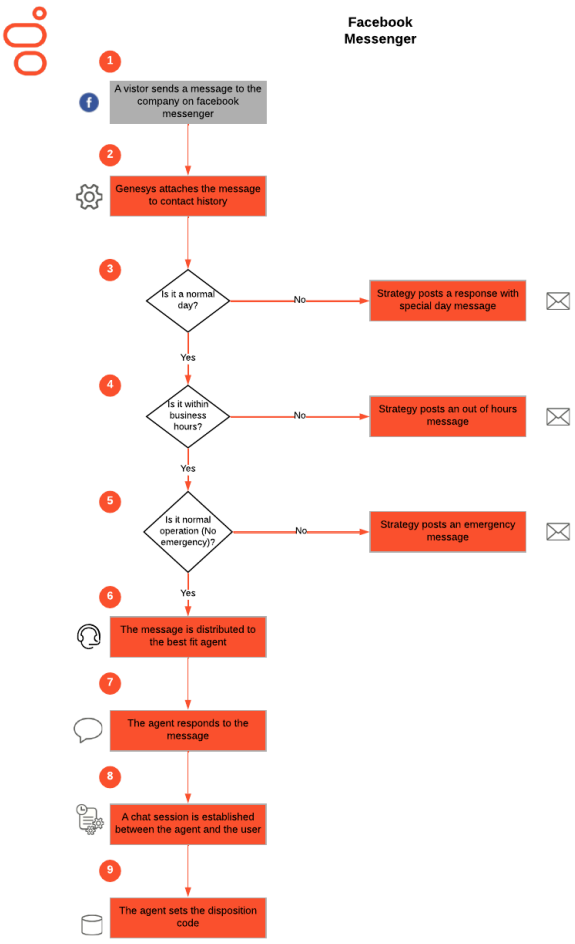
Business and Distribution Logic

Business Logic

This chapter describes the business logic and business rules, which drive the decisions made by the Genesys system within the business flow above, that is, the rules, which are used to determine if a



Business Flow Description



Business Flow Description

Business Flow Description – Reply with Facebook Messenger

1. User will send a facebook message to the company (e.g. after having been asked by an agent to connect privately).
2. The message will be stored with the customer contact in Genesys contact history
3. Genesys verifies if the day is a normal operational day. If not, a special day message can be sent stating that the message will be answered once the service is back online. The special day message will be sent via facebook messenger.
4. Genesys has the ability to determine if the operating hours of the service match the current time and day. If not, a standard message will be sent in response stating that the message will be answered once the service is back online. This message will be sent via facebook messenger.
5. In addition, it is possible to define an emergency message that will be sent once the emergency process is activated. If the emergency setup is invoked, then the system can answer with some emergency message via facebook messenger.
6. Genesys will search for an available agent with the correct skills.
   - If an agent is available, the interaction is routed to an agent.
   - If no agent is available, the interaction is queued until an agent becomes available
7. The interaction is sent to the agent for appropriate response.
8. A Facebook chat session is established between the customer and the agent.
9. When the interaction is finished the agent can set a disposition code to register the outcome for reporting purposes.

chat invite message is sent to a visitor.

The first part describes the engagement rules of

the social customer care. The second part describes any additional rules verified before the final decision.

For information about setting up and using social media channels in Genesys Engage on-premises, refer to the following articles:

- Set up Twitter and Facebook channels
- Handle Twitter interactions
- Handle Facebook interactions

Engagement Scenarios

The following 4 scenarios describe typical social customer care engagement which have been used successfully.

Scenario 1: Twitter - tweet to company

This scenario depicts an engagement when the customer is tweeting to the company's handle.

The customer uses their account to post a message.

Genesys Social Engagement captures this message according to predefined business logic (see below) and evaluates actionability.

Customer profile details are received with the message through the Twitter API. The profile details are attached to the interaction. The twitter message will be stored in the Genesys Contact History.

The original incoming twitter interaction is delivered to the agent workspace. The desktop identifies that this message was directed to the business and if the author is a follower of the business' twitter account

The agent reads the incoming twitter message and sends a public response. Alternatively, he/she may mark the tweet as “favorite” (Like), and/or mark this interaction as “Done”, assign a disposition code and not take any further action.

The workflow creates an interaction an outgoing twitter interaction and associates it with the same customer contact.

Genesys Social Engagement sends the reply back to the customer.

Scenario 2: Twitter - Direct Message (DM) to company

In this scenario, a customer is sending a DM to a company's twitter handle. Please note that this is only possible when one of the following conditions is satisfied:

- the flag “Receive Direct Messages from anyone” is activated in Twitter (not recommended as this might result in a high volume of messages)
- the customer is a follower
- a previous conversation was already established in the past to receive help

Please note that the Twitter policies which allow to send unsolicited Direct Messages may change.

This is outside Genesys control and the flow and / or preconditions to send Direct Messages may change.

User sends a DM to the company:

The user must be a follower of the company, so that the company can send a direct message back. Therefore, non-followers are sent a follow request, e.g. “Please follow @Genesys for us to assist you”. This allows the User to assist customers over Twitter privately.

The tweet is stored in Genesys Contact History as an outgoing twitter message and associated with the same contact.

Genesys Social Engagement sends the Twitter message to the customer.

The customer sees the tweet and responds by following the @Genesys Twitter account.

The company then has a different choice of actions to perform, also according to what other channels are available for the agent and customer. If no other channel is available, the agent can reply to the direct message with the intended information and the interaction is closed.

Scenario 3: Facebook - post on Company's timeline (wall) or comment to post (Reply)

The customer uses his account to post a message on the company's timeline (wall) or posts a reply to a post from the company's timeline.

Genesys Social Engagement queries this page's wall and finds the new post with comments. The query is run on a configurable timer.

Genesys Social Engagement captures the message and creates an interaction in Genesys. The interaction consists of an original post plus comments which are posted within the query's timeframe. Additional attributes describing the post author's and commentators' profiles are also part of the interaction structure.

A customer contact will be created / updated for the initial author of the original post. Based on your business requirements you can decide whether you want to create a contact record for each author of a potential reply to the original post or only for the initial author (recommended).

The strategy stores the post including comments in Genesys contact history and associates it with the contact(s).

NOTE: while the interaction representing the initial post and comments is in the queue, further comments could be added. The query could pick up these additional comments and create another interaction. The agent receiving the first interaction will be notified of the remaining pending interactions.

The Incoming Facebook interaction will be delivered to an agent.

The agent processes the incoming Facebook message and sends a response if required. Also he/she may mark this interaction as “Done” and not take any further actions.

Genesys stores the message text of the outgoing Facebook interaction in Genesys Contact History for the same contact.

Please NOTE: The outbound Facebook message will be a child of the original message. (Reply)

Scenario 4: Facebook - private messaging

Facebook messenger can only be initiated by the end user.

The user needs to invite the company to a chat session via the “Message” button on the main Facebook page.

Genesys receives the chat request and distributes to an agent. The customer's public Facebook info is passed with the chat request.

The agent is alerted of an incoming Chat session with a "toast" indicating the chat is with the Facebook customer.

The agent accepts the chat interaction and begins a chat conversation with the customer.

Genesys Social Engagement sends the reply back to the customer.

Keyword mapping

There are two entities taking care of actionability detection and keyword mapping:

- The cloud driver software
- The on-premise content analyzer

Cloud driver logic

The cloud driver can be configured to monitor either a specific account (=all interactions that are related to the account) or keywords (such as hashtags or specific words that are relevant to the social customer care task). Please be careful when specifying keywords as common words or hashtags may result in a large number of interactions that are both filtered and routed at the on-premise server, thus impacting the overall performance of the architecture. In addition to this, Twitter and Facebook have policies that might prevent or block the account from receiving all those interactions, or might throttle message processing, if they receive too many processing requests, resulting in lost messages or delays in sending or receiving messages.

Content analyzer / Knowledge Manager

You can use Genesys Content Analyzer to run a secondary analysis on the actionability of interactions that are brought into the system by the Cloud Driver Logic. Genesys supplies samples, which demonstrate these capabilities.

Knowledge Manager provides additional key-word spotting abilities.

Content Analyzer provides Natural Language Processing Capabilities.

You can use the sample training objects to produce new models, improving the quality by making adjustments such as:

- Altering the settings such as those for quality level.

- Using the Mail Editor to edit the content of the messages in the training object.
- Using the Mail Editor to add more sample messages to the training object.

Genesys also provides sample-screening rules for detecting sentiment and actionability.

Please see the latest product documentation for supported languages.

Please note: this channel type is a hybrid between chat and social. It is a chat session but can also receive offline messages and these can be delivered via Facebook (i.e. messages sent by the customer after the chat interaction with the agent has been finished). These will be handled as a new interaction. Sending offline messages from the agent workshop is currently: if the agent needs to send info via FB Messenger, the end user must initiate the conversation and re-open the chat session.

Distribution Logic

The following lists the minimum requirements for distributing a social message to agents:

- One skill is needed for distribution of all social interactions (no differentiation according to topic or Media). All agents with the corresponding skill are the target for distribution of interactions (no skill level).
- Blending with other media types is supported including configuration of capacity rules.

User Interface & Reporting

Agent UI

The following lists the minimum requirements for the Social Engagement interfaces:

- The agent workspace will be enabled to handle Social Media Interactions (Facebook & Twitter) supporting Genesys standard functionality.
- Access to Universal Contact History.
- Configuration of not-ready reason codes (Admin Work, Lunch, Meeting, Pause, RONA and Training).
- Configuration of disposition codes (Cross Sell, Need Follow Up, Not Right Skill, Processed, Terminated, Transferred, Up Sell).
- Access to standard response library.

Reporting

Real-time Reporting

Genesys Pulse enables at-a-glance views of real-time contact center statistics through dashboards and wallboards.

Each Genesys Pulse report presents information within graphical widgets, which show graphs or tables that provide information about incoming voice call queues, agent groups, or individual agents. You can personalize Genesys Pulse reports based on functional, geographical, or organizational considerations.

Genesys Pulse provides templates for the most popular reports. You can use these templates to quickly add report widgets to your dashboards.

The following Genesys Pulse standard reports are particularly relevant for this use case:

- Facebook Media Activity
- Twitter Media Activity

See Standard Report Templates for more information.

Historical Reporting

Genesys CX Insights (GCXI) provides customizable reports and dashboards that can help you track the benefits of this use case by enabling you to assess the day-to-day operations of the contact center resources for the routing and handling of interactions.

Some of the most relevant reports that are useful to measure the effectiveness of the engagement rules and efficiency of the use case include:

- Agent Social Engagement Report — Provides detailed information about average social media scores in each configured standard response or category, for each agent and day. Includes average agent social media scores for Sentiment, Influence, and Actionability. This report must be configured for your use, and can be customized to better suit your environment.
- Interaction Handling Attempt Report — Provides detailed information about handling times, agent participation, engage time, routing time and parameters, and the technical results (disposition) associated with customer interactions. Use this report to understand how the contact center is routing and handling interactions, and evaluate conversion success rates.
- Other reports in the Agents,Business Results, and Detail folders are useful to evaluate resource performance.

For more information, see *Genesys CX Insights 9.0 User's Guide*.

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

All of the following required:	At least one of the following required:	Optional	Exceptions
None	None	None	None

General Assumptions

- Implementation of this use case is based on the Digital Blueprint Architecture.
- Genesys Infomart and Interactive Insights is used for historical reporting.
- WDE is used as agent workspace (with social plug-in)
- Genesys Pulse is used for real-time reporting.
- Please note that public posts, comments and tweets can be edited or deleted by a user while an agent works on a resolution, which is not addressed or reflected in this use case

Customer Responsibilities

- GSE in configured to handle interactions from the company’s Facebook page and Twitter handle.

Related Documentation

Agent Workspace

Agent Workspace integrates social media channels into the Chat interaction interface to make handling Facebook messages, Tweets, and other social media as simple as chatting.

- Chat interactions
- Social engagement with Facebook
- Social engagement with Twitter
- Contact interaction management

Workspace Desktop Edition

Workspace integrates social media channels into the Chat interaction interface to make handling Facebook messages, Tweets, and other social media as simple as chatting.

- Chat interactions
- Social engagement with Facebook
- Social engagement with Twitter
- Contact interaction management

Document Version

- Version **v 1.0.3** last updated **April 29, 2026**