
Getting Started for Direct Messaging

Converse | Monitor | Engage

Configuration of social media platforms

In order to integrate any IM system with Click4Assistance, you will be required to make some changes to your business social media platform.

Unfortunately Click4Assistance cannot do this for you, as we do not have access to your social media account and would be unable to agree to any terms on behalf of your business.

Please see below for further information relating to specific platforms:

Facebook

To integrate Facebook Messenger with Click4Assistance, you will need to follow the instructions contained in our **Facebook integration guide**. Although our support department are more than happy to assist, as it's your Facebook account any changes to your Facebook Messenger must be made by someone within your organisation with authorised access.

WhatsApp

To integrate WhatsApp with Click4Assistance, you will need a Twilio and Facebook Business account. Just follow the instructions contained in our **WhatsApp integration guide**. Although our support department are more than happy to assist, as it's your Facebook account any changes to your Facebook Messenger must be made by someone within your organisation with authorised access.








SMS

SMS is not considered a social media platform, therefore there is nothing you need to do. Just contact your account manager at Click4Assistance and they will arrange for a phone number to be allocated for your SMS integration. This usually takes around 72 hours.

Configuring Click4Assistance

Adding Direct Message Experiences

Click4Assistance has made integration as simple as possible by allowing 'Experiences' to be created for different IM systems. This method not only provides flexibility when new IM systems are added, but also ensures consistency across each IM system.

ACTIVE	NAME	ROUTING GROUPS	AVAILABLE
 <input checked="" type="checkbox"/>	 Facebook - C4A Page	Direct Msgs.	 <input checked="" type="checkbox"/>
 <input checked="" type="checkbox"/>	 WhatsApp-1	Direct Msgs.	 <input checked="" type="checkbox"/>
 <input checked="" type="checkbox"/>	 SMS-1	Direct Msgs.	 <input checked="" type="checkbox"/>

Each experience allows you to:

- Determine which routing group(s) are notified to the incoming messages.
- Automatically respond to the first incoming message with preset welcome text when agents are available.
- Automatically respond with a preset unavailable message when agents are not available.
- Configure the relevant settings which relate the IM system.

Handling Direct Messages

Messages from systems such as Facebook, WhatsApp and SMS work differently to web chat as they never really come to an end. Potentially, a chatter can continue an interaction with your organisation across many days, weeks, months or even years.

When a chatter first engages with your organisation, a direct message **session** is created, this session remains until the agent deletes or stores it.

From a data retention and security perspective, we will store **messages** for **30 days**, unless otherwise agreed. Once all messages which relate to a session are deleted, the session will also be automatically deleted.

We recommend that agents manually store sessions at reasonable intervals to ensure the number of visible session are maintained at a manageable level. Once a session is stored, if the chatter send a new message, the session will become active again and reappear in the list of direct messages.

Direct Message List





The Direct Message list contains all sessions from the IM systems in once place. An icon denotes the IM system; sessions which are awaiting a response appear at the top of the list.

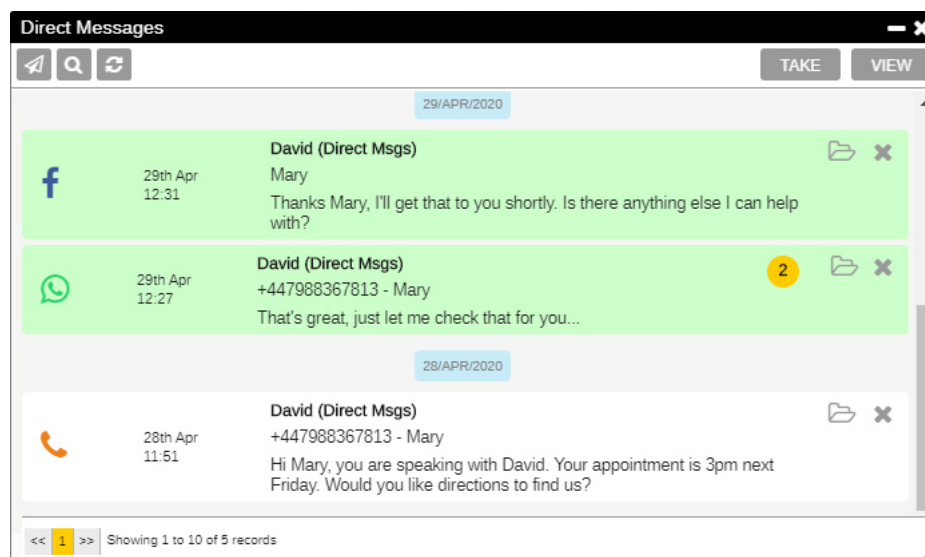
Should someone message from Facebook, you will be provided with their first and last name.

If a new message comes from a SMS or WhatsApp you will be provided with their phone number.

To identify these messages, you have the ability to manually add a first and last name against the session (see further information below)

The following functionality is available:

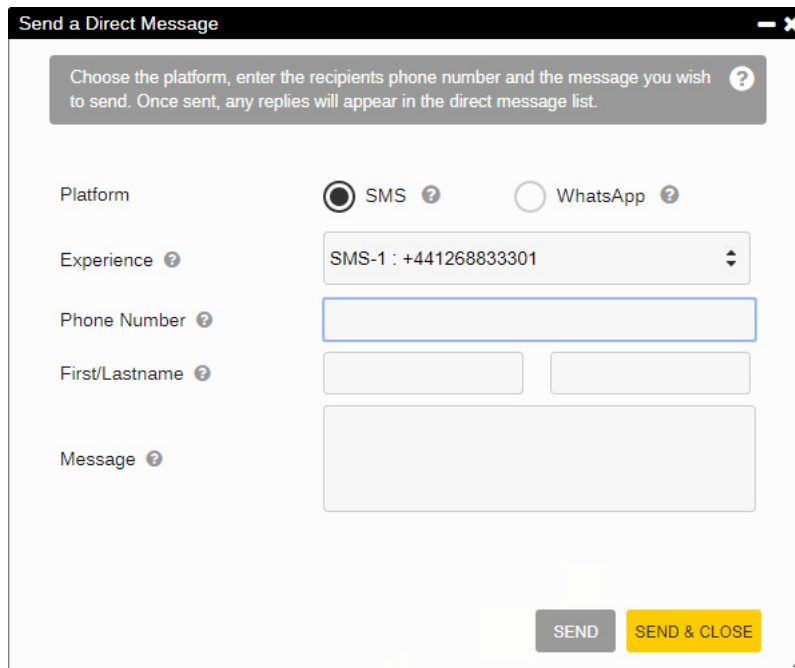
	Send a message via SMS or WhatsApp
	Search active or stored sessions
TAKE	Take this session, so other agents are aware your dealing with the enquiry
VIEW	View the complete message thread of the session
	Store the session
	Delete the session



Send SMS/WhatsApp

SMS Text messages can be sent to any mobile number, however due to WhatsApp policy you can only message WhatsApp users if they have previously messaged you.

When entering the recipient's phone number ensure you include the county code and drop the zero, e.g. +447866000000. The first and last name are optional but recommended to help identify the recipient when they reply.

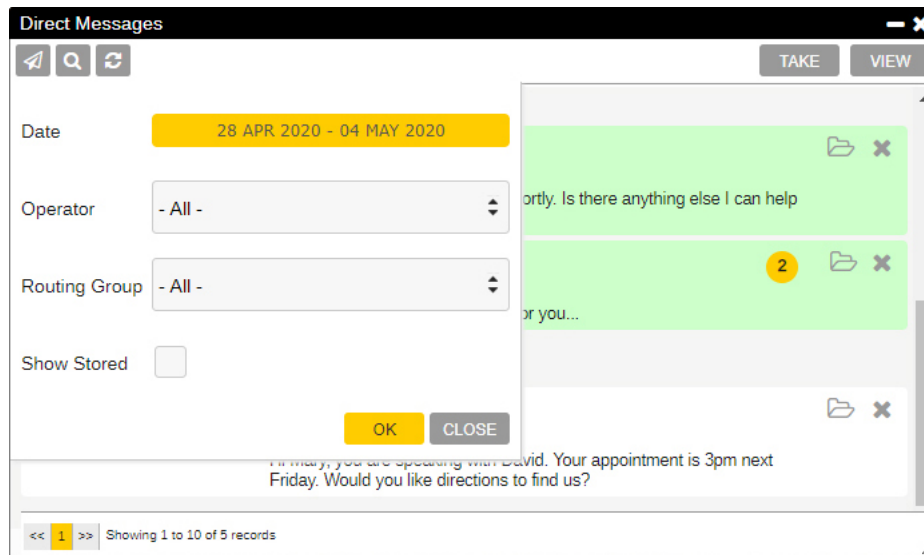


The screenshot shows a web form titled "Send a Direct Message" with a close button in the top right corner. The form contains the following elements:

- Instructions:** "Choose the platform, enter the recipients phone number and the message you wish to send. Once sent, any replies will appear in the direct message list." (with a help icon)
- Platform:** Two radio buttons: "SMS" (selected) and "WhatsApp". Both have help icons.
- Experience:** A dropdown menu showing "SMS-1 : +441268833301".
- Phone Number:** An empty text input field.
- First/Lastname:** Two empty text input fields.
- Message:** A large empty text area.
- Buttons:** "SEND" (grey) and "SEND & CLOSE" (yellow) buttons at the bottom right.








Search active or stored sessions

The search facility allows you to recall active and stored sessions. The filter allows you to select a date range, which operator handled the session and the assigned routing group.



Responding to messages

By clicking on the session, the direct message session will appear, providing the ability to reply. Depending on the type of IM system various options are available.

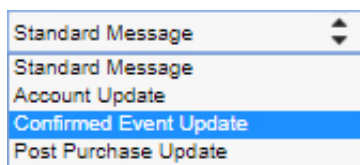
	Show further details relating to the session.
	Displays the predefined replies window, allowing you to drag and drop replies in the same manner as Web Chat.
	Displays the end categories window, allowing you to drag and drop end categories which allows simple categorisation of the session in the same manner as Web Chat.
	Transfer a file – Currently this is only available for Facebook, and allows the operator to transfer a file to the Facebook user via our quarantine server.
	Store the session –We recommend storing sessions to ensure the session list is kept at a manageable level. Sessions can be recalled at a later date is required.
	Delete the session.
	Take this session, so other agents are aware your dealing with the enquiry.

Facebook/WhatsApp – 24hour restriction

Facebook and WhatsApp apply a 24 hour restriction when sending standard message responses.

Therefore, you must reply within this time period to all message. For more information please refer to this link <https://developers.facebook.com/docs/messenger-platform/policy/policy-overview/>

There is an exception to the 24 hour restriction if you wish to send the Facebook recipient a message relating to an update on their account, confirmation of an event, or a post purchase update. If either of these options are used, please ensure you adhere to the Facebook policy otherwise your Facebook account could be suspended due to misuse.



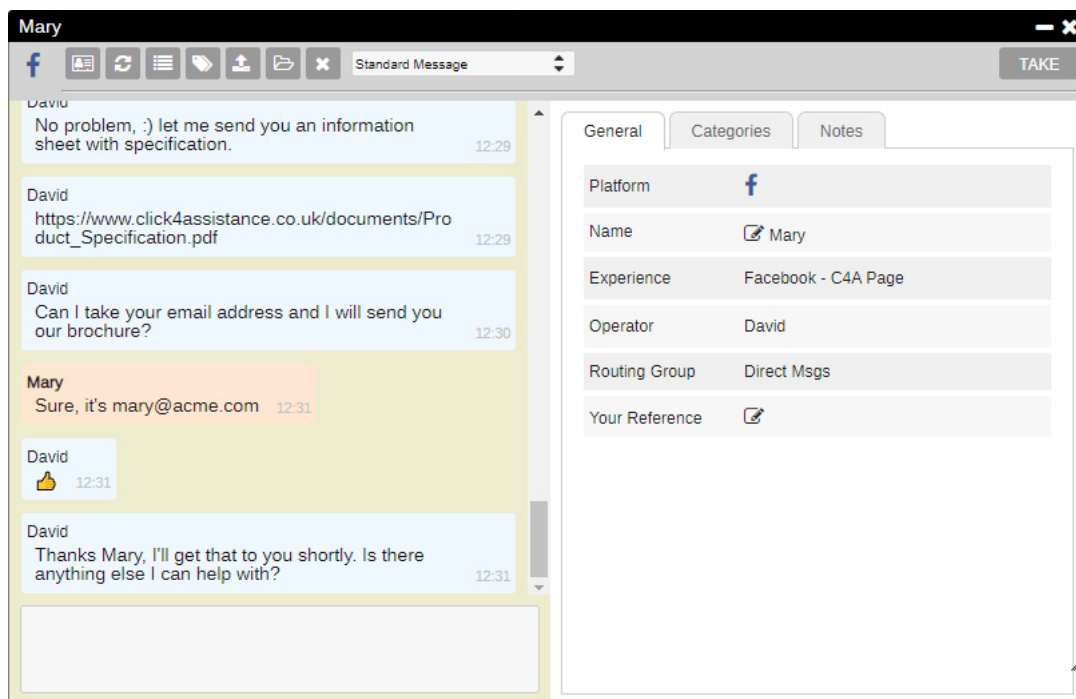
Further details

By clicking **Further Details** on the toolbar, you will be presented with the following information:

The **General** tab allows you to assign or change the name of the recipient for easier identification. You can also provide your own internal reference if required.

The **Categories** tab allows sessions to be categorised for reporting purposes.

The **Notes** tab shows any notes assigned against the session, and provides the ability to add additional notes at anytime.



Disclaimer

Due to the nature of direct messaging, there are a number of platforms including Facebook and WhatsApp that information must pass through to reach each recipient. Click4Assistance has no control over the data policies of these platforms. By using direct messaging you are agreeing to the relevant data policies enforced by these platforms.

Any personal data including each message is stored within the C4A secure servers and uses encryption at rest. Data is transmitted over HTTPS/SSL. By default Click4Assistance will store the last 30 messages for each session regardless of its platform. Should you wish to increase this retention policy, please notify your account manager.

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