



# SocialMiner Configuration

This section outlines the initial setup that must be performed when SocialMiner is first installed as well as the ongoing user-configurable options that can be used once the system is up and running.

The Feeds, Filters, and Campaigns panels are all found on the Configuration tab.

The Notifications and Reply Templates panels are found on the Administration tab.

You can sort and search the list appearing in any panel. Sort the list by selecting the heading or arrows at the top of the panel. After you select a heading, an arrow appears indicating the sort method (ascending or descending). To search a list, enter your search text in the Search text box above the list.

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## Feeds

The Manage Feeds panel lets you view, delete, add, and edit feeds.

A feed is a stream of contacts coming from a single source. Setting up feeds is a foundational step for your SocialMiner system. (You need to configure at least one feed and add it to a campaign before you can start seeing contacts on your home page.)

SocialMiner uses a process called de-duplication to automatically remove duplicate contacts. For example, if a user configures several overlapping feeds that capture the same result, then SocialMiner does not capture the same contact twice. The de-duplication functionality relies on the unique URL of the post. Before SocialMiner creates a new contact in the data store, it verifies that the URL of that contact is not already in the data store.

Feed types are:

- **Push**—Use this feed type to create social contacts. For example, by using an HTML form or to submit the social contacts directly into the feed. (Only the SocialMiner Administrator sees Push as an option on the feed Type drop-down.)
- **Chat**—Use this feed type to create social contacts for chat. (Only the SocialMiner Administrator sees Chat as an option on the feed Type drop-down.)

- **Callback**—This feed type receives incoming callback requests from the Callback API and, provided they are properly tagged, triggers Connection to CCE notifications to forward the callback contact to CCE for routing to a contact center agent. (Only the SocialMiner Administrator sees Callback as an option on the feed Type drop-down.)

Callback feeds are only used when SocialMiner is deployed with Unified CCE.

- **Email**—An IMAP email feed. You can view email feeds in the SocialMiner user interface. However, you cannot create a new email feed or modify an existing one. Email feeds are only used when SocialMiner is deployed with Unified CCX. In this integrated deployment, Unified CCX automatically creates email feeds as needed.
- **Task**— Use this feed type to submit incoming Task requests through the Task API. Task feeds are only used when SocialMiner is deployed with Unified CCE. If the feed is tagged properly, then the task contact is forwarded to Unified CCE for routing to a contact center agent through SocialMiner's CCE notification.

Icons are used as visual indicators to display the state of each feed. Hover the cursor over the icon to display a tool tip that explains the state.

-  The feed is operating normally.
-  Scheduled. This is a brief interim state. Feeds are normally in this state for a very short time.
-  An error occurred. Hover over the error icon to display a tool tip with the error text.
-  The feed has been created, but is not assigned to any campaigns.
-  The status of the feed cannot be determined.

Contacts retrieved by feeds are time-limited by the number of days defined in the Purge Social Contacts older than (days) setting of the Purge Settings tool on the Administration tab. The default is to retain social contacts for 30 days.

If you change a feed (for example, to rename it, change the URL, or change the polling interval), you do not need to re-add it to the campaign.

### Adding and Editing Feeds

To create a feed, click **New** in the Manage Feeds panel. To edit the settings for a feed, select its name.

Select the feed type and complete the fields for the feed type. The fields vary by feed type, which are described below.

#### Adding Feeds Using the Feed Bookmarklet

The link at the bottom of the Manage Feeds panel, Feed Bookmarklet, initiates the process to create a bookmarklet in your browser that you can use to create feeds.

### Deleting Feeds

Select the checkbox to the left of one or more feed names and click **Delete**. A confirmation dialog box appears. Click **OK** to confirm deletion of the selected feed(s).

### Polling Interval for Feeds

The polling interval controls how often SocialMiner updates the feed. A shorter polling interval provides more frequent updates but creates more load on the SocialMiner server and on the sites publishing the feed. Some sites may have recommendations or restrictions on frequent polling and could block an application that polls too frequently.

The default SocialMiner polling interval for feeds is five minutes.

### Minimum Age for Feeds

Use the minimum age setting to filter out recent posts.

### Automatic Tags for Feeds

All feeds support automatic tagging, which allows you to specify up to 20 tags that are applied to new contacts for a feed across all campaigns that include that feed.

To add an automatic tag to the feed, enter one or more (separated by commas) tags into the Automatic Tags text box, then click **Add**.

To remove an automatic tag from the feed, select the small x next to the tag name.

### Extension Fields in Push and Chat Feed Sample Code

Extension fields are a collection of custom name and value pairs that can be added to social contacts using the push feed and chat feed sample code. You can add social contact data to email and IM notifications by including extension fields as notification body variables.

You can add a maximum of 100 extension fields; up to one megabyte of information.

The following sections describe how to configure specific feed types. Fields marked with an asterisk (\*) on the form are required. All other fields are optional.

## Push Feed

The push feed allows you to "push" social contacts directly to SocialMiner through HTTPS GET or POST requests. A push feed is an interface for generating a social contact through a web form. For example, you might want to create a social contact to test the routing of email notifications. You might also want to create a social contact for a response to a feedback form on your website.

The SocialMiner Administrator can add, edit, and delete push feeds. Non-administrators can only see, use, and add push feeds to campaigns on the Configuration tab.

### Configure a Push Feed

1. Access the Manage Feeds panel.
2. Click **New**.
3. Select **Push** as the feed type, then enter information in the following fields:
  1. Name
  2. Description
  3. Reply template—the reply template to be used for replying to social contacts obtained from this feed.
  4. Automatic tags—provide automatic tags for the feed.

4. Click **Save** to save the feed.
5. Select the saved push feed from the list of feeds to open it in edit mode. You see a **Sample Code** link which contains working HTML code containing the correct IP address and feed id values for the instance you are working on. It also displays the form fields you need to get from the user and some examples of optional fields you can include, such as tags and extension fields.

In the following example, we use extension field 'Remarks'.

```
<style type='text/css'>span { display: inline-block; width: 100px; }</style>
<meta http-equiv="Content-Type" content="text/html; charset=utf-8">
<form action='https://<ServerIP>:<Port>/ccp-webapp/ccp/pushfeed/117835' method='get'>
  <span>Title:</span>
  <input id='title' type='text' name='title' /><br/>
  <span>Author:</span>
  <input id='author' type='text' name='author' /><br/>
  <span>Description:</span>
  <input id='description' type='text' name='description' /><br/>
  <span>Tags:</span>
  <input id='tags' type='text' name='tags' /><br/>
  <span>Remarks:</span>
  <input id='remarks' type='text' name='extensionField_remarks' value='sample value'
/><br>
  <input id='submit' type='submit' value='Submit' />
</form>
```

6. Copy the code from the sample code link and save it as HTML. Edit the fields; then click **Submit** on the HTML form.

The social contact will appear in the campaign that includes the push feed.

If the tags in the push feed code are associated with notification rules, the notifications will trigger immediately when the social contact is submitted.

You can have multiple independent push feeds on one SocialMiner system.

The push feed must be associated with a campaign in order to activate. Create a test campaign prior to testing your push feed.

## Chat Feed

A chat feed is a variation of a push feed that contains sample HTML code for the fields a customer sees in a click-to-chat request form. When the customer clicks on a chat button and submits the form, a social contact is created and added to the campaign for the chat feed. SocialMiner displays a welcome screen, sets up a chat session for that social contact, and logs the user represented by that social contact into the chat session.

The SocialMiner Administrator can add, edit, search, and delete chat feeds as well as set the values for the chat join and chat inactivity timeouts. These values are set on a feed-by-feed basis.

Users can see, use, and add chat feeds to campaigns on the Configuration tab.

You cannot configure a chat feed from the SocialMiner user interface. Unified CCX automatically creates chat feeds as required in an integrated deployment with SocialMiner and Finesse.

### Configure a Chat Feed

1. Access the Manage Feeds panel.
2. Click **New**.
3. Select **Chat** as the feed type, then enter information in the following fields:

1. Name
  2. Description
  3. Chat join timeout—define how long the system waits for an agent to join the chat during the setup process before sending the customer the chatAgentJoinTimeout message (see below).
  4. Chat inactivity timeout—define how long the system waits before automatically closing the chat session if there is no customer activity.
  5. Reply template—select **Cisco Chat**. The **Cisco Multi-session chat** option is only used when SocialMiner is deployed with Unified CCX and Cisco Finesse for multisession chat.
  6. Automatic tags—provide automatic tags for the feed.
4. Click **Save**.
  5. Select the saved chat feed from the list of feeds to open it in edit mode.
  6. Select the **Sample Code** link to open sample code that contains working HTML with the form fields you need to make the POST request for the chat feed.
  7. Save the code from the Sample Code link locally and modify it as needed.

For example:

Replace `"/img/ciscoLogoColor.png"` with the location of your own logo and replace the default `extensionField_chatError` and `extensionField_chatWaiting` text strings with the messages you want the customer to see for each circumstance.

8. Add the HTML to your website.
  - The HTML code from the Sample Code link includes the SocialMiner server IP address and feed ID (100045 in the following example). If you have multiple chat feeds, the Feed ID will be different for each one; be sure to copy the sample code from the correct chat feed.
  - The code also contains form fields: Title, Author, Description, Tags, and three extension fields.
  - In general, extension fields are a collection of custom name/value pairs that can be added to social contacts and are subsequently displayed in the Agent Chat user interface. For example, a 'Remarks' extension field appears in the sample form below. The name of the field and the value entered by the customer are added to the social contact and are displayed to the agent.
  - Four hidden extension fields are special extension fields used to customize the customer chat user interface - they are not added to the social contact and therefore are not displayed in the agent chat user interface.
    - `extensionField_chatAgentJoinTimeOut`
    - `extensionField_chatError`
    - `extensionField_chatLogo`
    - `extensionField_chatWaiting`

During the chat setup process, if no agent responds before the chat join timeout, the customer is sent a message (defined in `extensionField_chatAgentJoinTimeout`) indicating that they can continue waiting or try again later.



**Note** Users must localize the messages they insert in the sample form in order for it to appear appropriately in their customer chat interface. For localization into languages that use characters outside the ASCII set, the characters need to be encoded into HTML character references to avoid corruption.

The sample code also includes a **Submit** button.

Here is an example of the SocialMiner code for a chat feed. This example is for illustration purposes only - do not copy and paste from this example as the server address and feed ID will not be appropriate for your instance. Always use the code from the Sample Code link.

```
<style type='text/css'>span { display: inline-block; width: 100px; }</style>
<meta http-equiv="Content-Type" content="text/html; charset=utf-8">
<form action='https://<SocialMinerServer>/ccp/chat/form/100045' method='post'>
  <span>Title:</span>
  <input type='text' name='title' /><br/>
  <span>Author:</span>
  <input type='text' name='author' /><br/>
  <span>Description:</span>
  <input type='text' name='description' /><br/>
  <span>Tags:</span>
  <input type='text' name='tags' /><br/>
  <span>Remarks:</span>
  <input type='text' name='extensionField_remarks' value='sample value' /><br>
  <input type='submit' value='Submit' />
  <input type="hidden" name="extensionField_chatLogo" value="./img/ciscoLogoColor.png">
  <input type="hidden" name="extensionField_chatWaiting" value=
    "Welcome, please wait while we connect you with a customer care representative.">
  <input type="hidden" name="extensionField_chatAgentJoinTimeOut" value=
    "All customer care representatives are busy assisting other clients.
    Please continue to wait or try again later.">
  <input type="hidden" name="extensionField_chatError" value=
    "Sorry, the chat service is not available. Please try again later.">
</form>
```

When a user completes and submits the form, a URL to the new social contact is returned. The user sees an interface with the welcome message.

If no agent picks up the chat before the first timeout, the message changes to indicate no agent is available.

If the system reaches the second timeout before an agent picks up the chat, the user receives the chat error message.

### Modify the Sample Code for a Chat Feed

You can modify the content within the span tags and add more extension fields. You cannot delete the title or author.

#### Example of a Modified Form

In this modified form, the label for "Title" was changed to "My Issue". The label for "Author" was changed to "My Name". "Description" was removed. The "Remarks" extension field was removed, and three extension fields were added: "My Preferred Language", "My Phone", and "My Email".

```
<style type='text/css'>span { display: inline-block; width: 100px; }</style>
<meta http-equiv="Content-Type" content="text/html; charset=utf-8">
<form action='https://<ServerIP>:<Port>/ccp/chat/form/100051' method='post'>
```

```

<span>My Issue:</span>
  <input type='text' name='title' /><br/>
<span>My Name:</span>
  <input type='text' name='author' /><br/>
<span>Tags:</span>
  <input type='text' name='tags' /><br/>
<span>My Preferred Language:</span>
  <input type='text' name='extensionField_language' value='enter language' /><br>
<span>My Phone:</span>
  <input type='text' name='extensionField_phone' value='enter phone number' /><br>
<span>My Email:</span>
  <input type='text' name='extensionField_email' value='enter email address' /><br>
  <input type='submit' value='Submit' />
</form>

```

## Callback Feed

A callback feed allows callback applications to submit customer requests to CCE for a return phone call (a callback) from a contact center agent.

The SocialMiner Administrator can add, edit, and delete callback feeds. Non-administrators can see callback feeds on the Configuration tab and add them to campaigns.

Before creating an agent request with the Callback API, you must have a Callback feed assigned to a campaign and a 'Connection to CCE' notification set up with a tag that matches the tag defined in this feed.

### Configure a Callback Feed

1. Access the Manage Feeds panel.
2. Click **New**.
3. Select **Callback** as the feed type, then enter information in the following fields:
  1. Name
  2. Description
  3. Automatic tags—Configure the feed to automatically tag all callback requests that come in on that feed. This tag must match the tag on the Connection to CCE notification in order to trigger the notification.

Reply template automatically defaults to "No reply template".

4. Click **Save** to save the feed.

## Email Feed

You cannot configure an email feed from the SocialMiner user interface. Unified CCX automatically creates email feeds as required in an integrated deployment with SocialMiner and Finesse.

## Task Feed

A Task feed allows applications to submit multichannel customer requests to CCE to be routed to contact center agents.

The SocialMiner Administrator can add, edit, and delete Task feeds. Nonadministrators can see Task feeds on the Configuration tab and add them to campaigns.

A default Task feed, campaign, Connection to CCE notification, and tag are created automatically when you add SocialMiner as an External Machine in the Unified CCE Administration System Inventory tool. If the default Task feed, campaign, and notification have already been configured, they are updated to ensure that the feed is associated with a campaign and a Connection to CCE notification, and that the tags match.

### Configure a Task Feed

1. Access the Manage Feeds panel.
2. Click **New**.
3. Select **Task** as the feed type, then enter information in the following fields:
  1. Name
  2. Description
  3. Automatic tags—Configure the feed to automatically tag all requests that come in on that feed. This tag must match the tag on the Connection to CCE notification in order to trigger the notification.  
Reply template automatically defaults to "No reply template".
4. Click **Save** to save the feed.

## Campaigns

The Manage Campaigns panel on the Configuration tab lists campaigns and shows the name, the number of contacts that match this campaign, a description.

You must create at least one campaign and select at least one feed for that campaign before you see any contacts on the Home tab.

Campaigns group contacts for handling by the customer care team. Contacts are included in a campaign when one or more feeds are selected to be part of the campaign. When a feed becomes part of a campaign, new contacts that arrive on that feed are immediately added to the campaign and appear on the Home tab.

This list updates in real time (but depends on the configured polling interval of the campaign). For example, it updates when another user adds a new campaign to the system.

Results are updated every 10 seconds. The results number is bold if additional results were recently obtained.

Campaigns can also have filters that are used to narrow or modify the contacts that are included in the campaign.

Contacts can be discarded, but they are not actually removed from a campaign until they are purged or the campaign is deleted.

## Add Campaign

To add a campaign, click **New** in the Manage Campaigns panel.

Fill out the following fields, and then click **Save** to save the new campaign.

- Name (required)
- Description

Use the arrows in the Feeds and Filters panels to move one or several feeds and filters between the Available and Selected panels. You can save a campaign without adding a feed, but no contacts will be retrieved for that campaign. Adding a filter to a campaign is optional.



**Note** Once you click **Save**, the contacts for the configured feeds are added to the campaign. Once added, contacts can be discarded but cannot be removed from the campaign except by a purge. If a feed is removed from a campaign, new contacts captured by that feed are no longer added to the campaign, but the contacts previously included are not removed until a purge.

If a feed is accidentally added to a campaign and the contacts must be removed immediately from that campaign, the only recourse is to delete the entire campaign and recreate it.

Adding a feed to multiple campaigns does not duplicate the contacts in the data store; the contacts for that feed are simply counted in both campaigns.

### Add a Chat Invitation Feed to a Campaign

A drop-down menu allows a SocialMiner user to add a chat invitation feed to a campaign.

The drop-down lists all available chat feeds. Select an appropriate chat feed to add to the campaign as the chat invitation feed and click **Save**. When a chat feed is selected as the chat invitation feed for a campaign, that feed is moved to the selected feed list (to ensure that the chat contact created when the chat invitation is accepted by the customer comes back to the same campaign). If the chat feed designated as the chat invitation feed is manually removed from the selected feed list, the chats will go to any other campaign(s) that include that chat feed.

## Edit Campaign

To edit a campaign, select the name of the campaign in the campaign list view.

Fill out the following fields, and then click **Save** to save your changes.

- Name (required)
- Description

Use the arrows in the Feeds and Filters panels to move one or several feeds and filters between the Available and Selected panels.

## Delete Campaign

To delete a campaign, check the checkbox to the left of one or more campaign names and click **Delete**. A confirmation dialog box appears. Click **OK** to confirm the deletion of the selected campaigns.

## Reply Templates

The Manage Reply Templates panel in the Administration tab lists all available reply templates.

Only the Administrator (the application user created during installation) can access the Manage Reply Templates panel.

The panel lists the system-defined and the custom reply templates (the custom templates show both their name and URL).

There are three system-defined reply templates that cannot be edited or deleted.

- **Cisco Chat** is the default template for both standalone SocialMiner and Unified CCX single-session chat feeds. This template opens the chat session for the agent and displays a message to the user indicating that the agent has joined.
- **Cisco Email** is the default template for Unified CCX email. You cannot use this template in a standalone SocialMiner deployment.
- **Cisco Multi-session Chat** is the default template for Unified CCX multi-session chat. You cannot use this reply template in a standalone SocialMiner deployment.

### Custom templates

The SocialMiner Administrator can develop custom reply templates and use them for Push feeds (but not for chat or email feeds).

See below for information on adding custom reply templates.

Once added, selecting the reply template name allows you to edit the name and URL. Select the checkbox to the left of one or more custom template names and click **Delete** to delete the reply template.

Reply templates must conform to the OpenSocial standard. Some tips for converting existing HTML pages into OpenSocial standard can be found [here](#).

After you have created your reply template, host it on a webserver that is accessible by SocialMiner and use the Reply Template panel to provide a name for the reply template and its location.

## Add Custom Reply Template

To add a custom reply template

1. Click the **New** button in the Manage Reply Templates panel.
2. Enter a name.
3. Enter the URL for the location of the custom template code.
4. Click **Save**.



#### Note

An example of code for a reply template is provided on the system at `https://<servername>/templates/reply/custom_reply_sample.jsp` (where <servername> is the name of your SocialMiner server).

The source code is commented and provides details on the SocialMiner javascript functions required. Additional training for developing custom reply templates is available at [the SocialMiner Lab Wiki](#).

For more information about using custom reply templates, see the *Cisco SocialMiner Developer Guide*.

## Filters

The Manage Filters panel on the Configuration tab shows the name, type, and a description for each filter that you have created. An icon next to each filter shows its current state.

A filter modifies and takes action on contacts as they enter the system and before they appear on the Home tab, allowing the customer care team to focus on the most actionable contacts.

Filters are run against contacts as they enter a campaign; they do not run retroactively against contacts that are already in a campaign.

Context Service Integration filters are added to a campaign created from Unified CCX. Manual filters cannot be added in the Unified CCX deployment.

### Preinstalled Filters

Preinstalled filters are configured when you install SocialMiner and are managed by the SocialMiner application. The Context Service Integration filter is a preinstalled filter. You cannot delete or modify preinstalled filters.

### Filter States

Icons are used as visual indicators to display the state of each filter. Hover the cursor over the icon to display a tooltip that explains the state.

-  The filter is working properly.
-  An error occurred in the uploaded script or the script filter violates SocialMiner security restrictions. Hover over the error icon to display a tooltip with the error text.
-  The state of the filter cannot be determined (such as when the Runtime service is down) and during a brief interim state while SocialMiner checks the state of the filter (after which the icon changes to red or green).



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**Note** Cisco Support and the SocialMiner Forum on Cisco DevNet do not assist with Groovy script issues. Direct all troubleshooting requests to your script developer.

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### Deleting Filters

Select the check box to the left of one or more filter names and click **Delete** to delete the filter. A confirmation dialog box appears. Click **OK** to confirm deletion of the selected filter.

## Bayesian Filters

A Bayesian filter is a trainable filtering technology based on a Bayesian statistical probability model.

### Add a Bayesian Filter

1. Access the Manage Filters panel on the Configuration tab.
2. Click **New**.
3. Select **Bayesian** as the filter type, then enter information in the following fields:
  - Name (must be unique)
  - Description
4. Click **Save**.

Once a Bayesian filter is added, go to Settings on the Home tab (see Train Bayesian Filters) to enable training for the filter.

#### **Edit a Bayesian Filter**

1. Select the filter's name.
2. Change the field values.
3. Click **Save**.

## **Author Filters**

The author filter allows you to exclude social contacts created by specific authors from being included in a campaign. For example, you may want to filter out your own posts or posts from team members.

Adding an author filter to keep your posts from showing up in your campaign reduces the number of posts you need to handle. It also improves the accuracy of the reporting metrics by excluding your own posts.

#### **Add an Author Filter**

1. Access the Manage Filters panel on the Configuration tab.
2. Click **New**.
3. Select **Author** as the filter type, then enter information in the following fields:
  - Name (must be unique)
  - Description
  - Authors—enter the name of an author to exclude from the feed.
  - Repeat steps 2 and 3 for each additional author to be excluded from the feed.
4. Click **Save**.

#### **Edit an Author Filter**

1. Select the filter's name.
2. Change the field values.
3. Click **Save**.

## **Script Filters**

The SocialMiner Administrator can add, import, edit, and delete Script filters. Non-administrators can see script filters on the Configuration tab and add them to campaigns.

You can upload multiple Groovy scripts and attach each to a SocialMiner script filter. There are examples of script filters in the *SocialMiner Developer Guide* and on Cisco DevNet.

SocialMiner runs scripts in Groovy 1.8.



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**Note** During the upload, SocialMiner performs a basic syntactic validation but cannot validate that the script will work as expected. For this reason, test your scripts on a lab system before using them in production. SocialMiner also performs security checks on each script. For example, a script does not run if it shuts down the system, takes longer than 30 seconds to execute, or accesses the SocialMiner file system.

For more on script security, see the *SocialMiner Developer Guide*. You can also open the runtime error logs in the log directory to see the list of security breaches.

Under the filename "runtime/", open the Error-runtime log and search for SCRIPT\_FILTER\_EXCEPTION.

You can upload scripts that fail the security model and apply them to campaigns, but they have no effect on the contacts. The Filters panel shows a red (failure) icon for the insecure script. Hover over the red "failed state" icon for information about the error.

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#### To add a Script filter:

1. Click **New** on the Manage Filters panel.
2. Select **Script** as the filter type, then enter information in the following fields:
  - Name (must be unique)
  - Description
3. Click the **Browse/Choose File** button (the button name varies by browser). Navigate to the groovy file on your local machine or network and select it.
4. Click **Save**.

#### To edit a Script filter:

- Select the name of the filter.
- Click the **Show Source** button to open the groovy script file in a separate window .

You can review and select/copy (but not edit) the source. You can also upload a new script file in Edit mode.



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**Note** Errors can result if an editor such as Notepad is used to edit a script written in a language containing multi-byte characters. Eclipse and Notepad++ are the most reliable editors to use for editing scripts.

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## Notifications

The Manage Notifications panel on the Administration tab lets you view, delete, edit, and add notification rules. You set up notification rules to send messages in reference to tagged contacts.



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**Note** Only the SocialMiner Administrator, who is the application user created during install time, can use the tools in the Manage Notifications panel.

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The Manage Notifications panel shows the following information for all defined notification rules:

- **Name**—the name of the notification.
- **Type**—the type of notification.
- **State**—the status of the notification.
- **Tags**—the tag or tags that trigger the notification.
- **Campaign**—the campaign associated with this notification.

Icons are used as visual indicators to display the state of each notification. Hover the cursor over the icon to display a tool tip that explains why the notification is in the current state and the last time the state changed.

-  The notification is operating normally.
-  The notification is in an unknown state.
-  An error occurred. Mouse over the error icon to display a tool tip with the error text.
-  The limit of 40 incoming callback contacts per minute was reached; any additional contacts are discarded.

Administrators can add, edit, or delete notifications. See the section below for adding or editing notifications.

To delete a notification, select the checkbox next to the notification name and click **Delete**; then click **OK** in the confirmation window.

IM and Email Notifications do not accept replies. The intent is to notify only; not to open a dialog.

If a reply template is associated with the social contact for which the notification is sent, selecting the link in the IM or email opens the reply template for that social contact.

## Add and Edit Notifications

### Add

To add a notification, click the **New** button in the Manage Notifications panel.

Enter or edit the following fields:

- **Type**—Notification types are:
  - **Email**—The notification is sent over email. A mail notifications server must be configured on the System Administration tab to use this type.
  - **IM**—The notification is sent over IM. An XMPP notifications server must be configured on the System Administration tab to use this type.
  - **HTTP**—Allows for notifications over HTTP using REST to contact an external service.
- **Name**—The name of the notification.
- **Description**—A brief description of the notification (optional).
- **Campaign**—Select a campaign with which you are associating this notification.

- **Tags**—Define the tags for this notification. Notifications are sent when a social contact is tagged with one or more of these tags and exists in the selected campaign. Click **Add** after each tag you enter. Auto-tagging (or adding multiple tags in one operation) generates multiples of the same notifications to the same recipients list. To remove a tag, select the **x** at the right of the tag name.
- **Addresses**—Enter an email address for this notification. Click **Add** after each address you enter. Addresses are used only for Email and IM notifications. To delete an address, select the **x** at the right of the address.
- **Subject**—The email subject for this notification. This field is available only for Email notifications and is blank by default. Enter a subject for email notification.
- **Body**—The body for this notification. This field is used only for Email notifications. HTML tags are supported for Email notifications. The body of the message supports notification body variables. For more information, see [Notification Body Variables, on page 15](#).
- **Message**—The message for this notification. This field is similar to the body field used only for IM notifications. IM notifications are sent using plain text. They also support notification body variables. For more information, see [Notification Body Variables, on page 15](#).
- **URL**—The URL of a REST API that identifies where to send the notification. This field is used only for HTTP notifications.
- **Verify SSL certificates?**—If checked, SSL certificates will be verified as trusted for notifications sent over SSL. If unchecked, certificates will not be verified. This checkbox is used only for HTTP notifications and is checked by default.
- **Username**—If authentication is required for the URL to the REST API, enter the authorized username. This field is used only for HTTP notifications.
- **Password**—If authentication is required for the URL to the REST API, enter the password for the authorized username. This field is used only for HTTP notifications.
- **Request Type**— Select the type of request for this notification. This field is used only for Connection to CCE notifications.
- **Dialed Number/Script Selector**—Select a dialed number/script selector (configured in CCE) for this notification. This field is used only for Connection to CCE notifications for Callback requests.

### Edit

Select the name of a notification rule to open a window where you can edit its fields.

### Related Topics

[Notification Body Variables, on page 15](#)

## Notification Body Variables

The notification body for emails and instant messages can contain keywords in the syntax **#{KEYWORD}**. These keywords are replaced with values from the contact that they are associated with.

By default, the body of the message contains a variable for the URL of the contact, which is **#{SC\_SCREEN\_URL}**.

You can add the following variables to the body of the notification to include the value of the variable in the notification. For Email Notifications, you can also use HTML tags to stylize the notification. IM notifications are sent using plain text.



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**Note** Keywords are listed here as all upper-case, but they are not case sensitive.

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- `{SC_AUTHOR}`—the author of the social contact (not available in all feeds).
- `{SC_CREATED_DATE}`—the date the social contact was created in the system.
- `{SC_DESCRIPTION}`—the description of the social contact.
- `{SC_PUBLISHED_DATE}`—the published date of the social contact (not available in all feeds).
- `{SC_SCREEN_URL}`—the URL to the social contact in the results gadget. Selecting this URL allows you to instantly reserve/reply to the social contact.
- `{SC_SOURCE_TYPE}`—the feed type of the social contact
- `{SC_TAGS}`—the tags for this social contact.
- `{SC_TITLE}`—the title of the social contact.
- `{SC_EXTENSION_FIELDS.<fieldname>}`—adds a specific, named extension field for the social contact. You can add a maximum of 100 extension fields and up to one megabyte of information.
- `{SC_EXTENSION_FIELDS}`—adds all extension fields that exist for the social contact. They appear in the body in alphabetical order by name in the format *Name: Value*. If no value was defined, you see *Name: (-)*. If there are no extension fields, the variable is removed from the message body.

For example, if the body an email notification includes the following:

- The author of this Social Contact is: `{SC_AUTHOR}`. `<br />`
- The message contents are as follows: `{SC_DESCRIPTION}` .`<br />`
- You can Reserve or Reply to the Social Contact `<a href="{SC_SCREEN_URL}">here</a>`.