

Talkdesk Digital Engagement: FAQ

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Product Overview

1. What is Talkdesk Digital Engagement?

Talkdesk Digital Engagement™ empowers your contact center to quickly identify, route, and respond to customer service needs across multiple digital channels, making it easy for agents to meet customers in their preferred channel.

2. What are some key features of Talkdesk Digital Engagement?

- Talkdesk Agent Workspace™: Seamless customer support across any channel: voice, SMS, chat, email, social messaging, and digital connect.
- Unified interface: All engagement channels on a single screen.
- Queue management: Centralized management of the customer's waiting experience, using one interface for all engagement channels.



- Unified reporting: All digital customer engagements reported within Talkdesk Explore™.
- Routing and presence: Decide between simplified routing, dedicated agent, or routing through Studio flows. Efficiently assign every agent to digital conversations, so that no customer goes unanswered.
- Integrations and automations: Create automations in Zendesk, Salesforce, Slack, Gmail, among other systems, whenever a new digital conversation starts, ends or is assigned.

3. What is the main value proposition for Talkdesk Digital Engagement?

Talkdesk Digital Engagement unifies all digital channels on a single interface, empowering agents to work more efficiently. It's accessible from anywhere, intuitive to use, and designed to deliver personalized customer experiences to meet the increasingly sophisticated digital engagement needs of your customers.

4. What are the benefits of Talkdesk Digital Engagement?

A one-stop-shop for customer digital interactions.

Engage with customers through their preferred channel and seamlessly elevate a conversation across channels without having to manage multiple applications and vendors.

Unparalleled agent productivity and efficiency.

Improve the agent experience with an all-in-one agent workspace, where all customer interactions across channels are viewed on a single interface for a unified experience. Paired with omnichannel routing, customers are always connected with the right agent.

Intuitive, personalized interface.

Reduce onboarding time and quickly develop power agents with a consistent, intuitive user experience across every Talkdesk application. Easily activate and manage channels without having to call support.

Integrate and automate reporting.

Keep a pulse on team performance and track key engagement metrics by unifying reporting across all channels on one platform.

Effective queue management.

Reduce handle times by giving agents one access point - for case information and interaction history - across all channels via a centralized queue management system.

Admin & Channels Configuration

5. What digital channels are currently available for Talkdesk?

Currently, customers can have (in addition to voice) the following digital channels: SMS, Chat, Email, Digital Connect, and Social Messaging, which includes Facebook Messenger and WhatsApp Business.

6. I already installed all the digital channels I need. How do I make them work now?

Once the digital channels and all necessary apps are installed on the account, you should go to “Admin”> Channels App and, for each channel, add and/or edit settings for each touchpoint.

It is important for Admins, Supervisors, and Agents to familiarize themselves with the features available. For this, you can consult our [Knowledge Base documentation for Digital Engagement](#).

7. What types of routing can I configure for my digital channels?

All digital channels, except Chat, have the following routing options available:

- **Simplified Routing:** Admins will be able to select for each touchpoint which queues will receive the conversations. Only agents belonging to at least one of these queues (ring groups) will receive the conversations in their inbox. Each conversation will display labels identifying the queues that received the conversation to provide context for the agents. Agents can click on **Assign** for the conversation to be moved from the **Inbox** to the **Assigned to you** tab.
- **Studio:** Admins can also associate a Studio flow with a touchpoint for more complex routing rules. Depending on the Studio flow configuration, the conversation can have manual or auto-acceptance. With the manual option, the agent will receive the conversation similarly to a voice call, in which the agent will have to accept or reject it. Using auto-accept, the conversation will appear in the agent's list of active conversations.

The Chat channel only has the Studio option available, due to its priority and more synchronous nature.

The SMS channel has an additional option:

- **Dedicated Agent:** Admins can define one Agent that will have the selected touchpoint as a dedicated line, meaning that only this agent will receive the conversations. These conversations will automatically appear in the agent's list of active conversations with the label “*dedicated*”, a special callout to help with prioritization.

8. How do I set an occupancy limit for agents and for each channel?

Going to **Admin > Channels > "Global Settings"**, you can define the Conversation weight.

The weight of a conversation is measured by points, and each agent has a maximum capacity of 100 points. The conversation weight for voice is fixed at the value of 51 and for each digital channels, you can define a different weight with the available points.

Note: *The change is not retroactive, and it will not apply to ongoing conversations.*

For more information, please refer to the following [Knowledge Base article](#).

9. How can I ensure that agents prioritize conversations properly?

Currently, it is possible for agents to view the priority of inbound conversations routed by studio in the Inbox tab. This way, agents handling multiple conversations are able to effectively manage their inbox accordingly to the level of importance attributed by the admins to each conversation.

Going to **Admin > Channels > "Global Settings"**, you can decide which style (icons or numbers) should be presented, and select the indicators for each priority level.

10. Can I configure sounds so that agents can hear and distinguish when dealing with conversations?

Yes, agents dealing with multiple customer interactions need to be able to get a notification when a new message arrives in the **Assigned to you** tab.

Configurable sounds for incoming messages enable agents to focus on their work without worrying about missing any new conversations. They are notified when a new message is available.

Going to **Admin > Channels > "Global Settings"**, you can configure the sounds your agents will hear when dealing with conversations. You can choose sounds for the following events:

- Inbound conversation offered.
- Auto-assigned conversation.
- Transferred conversation.
- New reply to ongoing conversation.

For more information, please refer to the following [Knowledge Base article](#).

11. Does Talkdesk Digital Engagement have any feature to configure templates?

Yes, templates are pre-written messages that help agents be more efficient. They can be grouped into collections, like "Sales" or "Support", for example.

Going to **Admin > Channels > "Templates"** tab, you can create, edit, and manage collections and templates. Currently, templates are available for the Email, SMS, Chat, and Digital Connect channels. It is possible for the same template to define different content per channel.

Depending on the active channels and templates, agents can start using them through a Templates icon on the Conversations screen.

For more information, please refer to the following Knowledge Base articles:

- For Admins:
 - [Configuring Templates](#)
 - [Managing Templates](#)
 - [Creating a Template](#)
 - [Editing a Template](#)
 - [Templates Integration with Knowledge Management](#)
- For Agents:
 - [Using Templates](#)

12. Do digital conversations have, like voice, dispositions and wrap-up phase?

Yes, wrap-up phase will be available right after you click on the End chat button. At that stage or even before, through the snapshot area, you will be able to fill in notes and dispositions for the conversation.

For more information, please refer to the following Knowledge Base articles:

- For Agents:
 - [Conversation Notes](#)
 - [Wrap-up Phase](#)
- For Admins:
 - [Wrap-up: Disposition Sets](#)

13. What kind of automations can I configure with digital channels?

Talkdesk Digital Engagement allows you to create automations (e.g. creating a case, update a ticket, or send an email when a new digital conversation begins, ends, or is assigned).

You can also integrate Talkdesk digital channels with Salesforce, Zendesk, Gmail, and Slack, among other integrations. To learn more, please refer to the following Knowledge Base articles:

- [Context in Automations](#)
- [Creating Automations based on Digital Events](#)

14. Does Virtual Agent work with Talkdesk Digital Engagement?

Yes, Virtual Agent works for Chat, SMS, Digital Connect, and WhatsApp digital channels. To know more, please refer to the following [Knowledge Base article](#).

Supervisor & Reporting Capabilities

15. Is Talkdesk Digital Engagement available in Explore and Live Reporting?

Yes, digital channels are integrated in Talkdesk Explore and Live. This way you can unify your contact center data. With Talkdesk Digital Engagement, Supervisors are able to access, create, and customize detailed reports and/or dashboards for all digital channels in Reporting - Explore.

Live Contacts Widgets for digital channels are also available in Reporting - Live.

These functionalities allow Supervisors and Admins to collect real-time and intraday data in order to gain actionable insights into contact center performance across all digital channels.

To know more, please refer to the following Knowledge Base articles:

- [Talkdesk Digital Engagement: Default Reports](#)
- [Talkdesk Digital Engagement: Default Dashboards](#)
- [Talkdesk Digital Engagement: Creating Reports and Dashboards](#)
- [Talkdesk Live](#)
- [Talkdesk Explore](#)
- [Talkdesk Data Dictionary](#)

16. How can I access the Conversation History?

Conversation History allows agents, admins, or supervisors to go back and review customers' conversations either for training or performance purposes to ensure high-quality customer service across all digital channels.

On Explore, if you are creating a new report, it is possible to access the history of a conversation. In the Messaging Contacts dataset, you can select the "Conversation" dimension. This "Conversation" column in the report will contain a link to the Conversation History app (where you can see the full conversation). The same dimension is available if you use the [Digital Contacts](#) default report. This functionality in Explore is available for all channels.

On Live, it is also possible to view the ongoing conversations. On the widget Live Contacts List, clicking on the 3 dots, you'll have the "Monitor" option.

Additionally, it is also possible to view the history of a conversation through the Contacts App. By selecting a specific contact (or via Contacts Pop in Conversations App) and going to the Activity of that same contact, when selecting the activity details of a conversation, you have access to the history through the **Conversation** tab. This option is available for SMS, Email, Chat, and Digital Connect channels for now.

17. **How can we have access to the conversations history and/or download it?**

It is possible to access the conversations' content through the Conversation History link. This link can be passed via Explore API or via automations to an external system.

18. **What Supervisor/Admin actions are available in Live Reporting?**

Through the available widgets, the user can copy the details of each conversation. In the Live Contacts List widget, the user can also preview the conversation and transfer the conversation to another agent or to a specific inbox.

19. **How is data stored, retained and encrypted in DCE databases?**

- **Data stored:** Conversation headers and details are stored in DCE databases. Conversation details are used to feed the Conversation History App. Internally, this information cannot be accessed by Talkdesk employees since there's no nominal access to the databases. However, in case of failure, this information can also be recovered from backups in order to guarantee service continuity.
- **Encryption:** Encryption at rest is done using AES 256 as the encryption algorithm. This is a standard for all Talkdesk databases (all products).
- **Retention:** Currently, the data availability in Explore goes as far as 13 months. Conversation details can be deleted at any time upon request, as we currently do not have any automatic mechanism to delete data after a given amount of time. For RTBF requests following GDPR, please contact support.

Agent & Conversations Capabilities

20. **How can I search and organize conversations that are unassigned?**

When an agent is looking for a specific conversation or trying to organize/prioritize work in the Inbox app (unassigned conversations), the agent can use some available capabilities, namely:

- Search box in order to look for a specific conversation by contact information including contact name, number, and email.
- Filtering by Channel and Touchpoint, Date and time, and Queues.

- Sorting the conversations from “Newest” to “Oldest”, or from “Oldest” to “Newest”.

21. Who can see the conversations that are in the Inbox?

A conversation that is in the Inbox, as a rule, has labels that identify the queues that received that same conversation. These queues are defined at the touchpoint level and have to match the Agent's Ring Groups. Only agents belonging to queues identified in conversations can see and assign these conversations in the inbox. Example: A conversation with the "marketing" and "orders" queues will only be visible to agents belonging to at least one of these queues.

22. Can I preview the conversations' content before assigning?

If the Preview feature is turned on, agents will be able to preview the content of the conversation before assigning it to themselves. This reduces misassignments and improves agent productivity.

23. Who can see the conversations that are in the Assigned to You?

The **Assigned to you** tab will contain all conversations that the agent was assigned. It means that only this agent will have access to this list of conversations and will be able to deal with them (unless said agent transfers the conversation or sends it back to the **Inbox**).

Additionally, the Supervisor can see, through Live, what each agent has assigned to them.

24. Do I have any details on a customer before replying to a conversation?

Yes, whenever a contact is known — i.e. contact's phone number or email is already in the Contacts App — the system will do this same mapping and will present the respective contact's name on a conversation.

When opening the conversation, the agent can also view a snapshot area that can have more context about the contact (for example, pop the Salesforce profile).

When the contact is not known, the agent can create a new contact or associate the conversation with an existing contact.

25. After assigning a conversation, I found that I can't resolve it. Can I return it to Inbox?

Yes, by clicking the **Send to inbox** button, the conversation will be sent back to the Inbox for agent reassignment. Alternatively, you have the **Transfer** button that will display all the queues and Agents that are available to transfer the conversation to.

For more information about this feature, please refer to the following [Knowledge Base article](#).

26. **How can I access a contact's conversation history?**

When an agent is with a conversation open, he/she will have a contact pop in the snapshot area that will redirect to the Contacts App, where it will be possible to consult the activity of that same contact (previous conversations) and respective history (by clicking on the activity and checking the “Conversation” tab). This feature is available for SMS, Chat, and Email channels.

27. **Can I send and receive attachments in my digital conversations?**

Agents and the contact person can share attachments between them. For more information, including file types and sizes allowed for each channel, please consult the following [article](#).

28. **What kind of visual notifications do I have to alert me of new conversations or messages?**

- On the **Assigned to you** tab, a yellow bubble shows the number of unread messages in each conversation.
- On the **Inbox** tab, a yellow bubble also shows the number of new unread messages for ongoing conversations, that were sent back to inbox or transferred to a queue.

Please refer to the following [article](#) to know more about this functionality.

29. **What happens if a Contact-Person sends a message with a current unsupported format (e.g. image)?**

The Agent will receive an automated message notifying them that the contact person has sent an unsupported message. This way, the agent can contact them using an alternative channel.

Channels & Availability

Chat

30. **What is Talkdesk Chat?**

Talkdesk Chat is a digital communication channel that enables businesses to engage with their customers in real-time through online chat.

Part of Talkdesk Digital Engagement, it provides a complete overview of customer interactions across all channels. Agents can manage multiple chats and switch between channels such as SMS and Email without losing any information.

31. What channel-specific features are available for Talkdesk Chat?

The main difference from the other digital channels is that there is a customer-facing interface: Talkdesk Chat Widget. It allows for the presentation of a pre-conversation form and the collection of information from the website for routing purposes or to provide more context to the agents beforehand.

32. How do I integrate Talkdesk Chat Widget with my website?

To integrate the widget into your website, include the chat widget's code snippet within your website's existing code. This can be achieved through two methods: via script or via iframe. While both options are viable, the use of an iframe is generally considered the most recommended approach.

33. Does Talkdesk Chat support subdomains and subdirectories?

It supports subdomains. Subdirectories are not supported.

34. Can I have more than one chat touchpoint with the same domain?

It is possible to have multiple chat touchpoints with the same domain. This proves beneficial when integrating various chat widgets across different pages of the website, accommodating various languages, or addressing specific needs.

35. Can I customize the chat widget's appearance to match my brand's style?

Yes, through the widget code you are able to customize color, icons, font, and more, to match your brand's style.

36. Can I present the chat widget in another language?

Yes. To present the chat widget in different languages, you need to create a chat touchpoint (and therefore widget) per language. To fully translate the widget into another language, you need to consider the language when configuring the touchpoint's appearance (for instance, when defining the custom fields labels), and to use the text customization keys in the widget's code to translate non-configurable UI elements (such as input box placeholders).

37. Are customers able to navigate the website while having a chat conversation?

Customers can open or minimize the chat widget at any time and navigate the website while chatting with one of your agents. When the widget is minimized, a red badge will

indicate how many unread messages the customer has.

38. Does Talkdesk Chat support Talkdesk Virtual Agent?

Yes, it does, through the Virtual Agent component on Talkdesk Studio. The incoming chat conversation can be assigned to the Virtual Agent component before assigning it to an agent.

39. How are chat conversations routed to agents?

Leverage Talkdesk Studio to establish chat flows that initiate when a customer sends a message. You have the ability to use conditional statements, traffic splitters, and/or calendar-based rules. With these Studio flows, you can decide to whom the chat conversations should be routed to and even set automatic replies if no agents are available, so your customers never go unanswered.

40. Why are customers identified as Visitor#NNN?

In the Conversations app, a visitor will be identified as "Visitor #NNN" if no contact is created or assigned to the visitor during the chat conversation.

Note: *If the "Name" field of the "Contact Details" card is populated, the visitor will be identified by that name in the "Assigned to you" tab, even if the contact is not saved.*

In Reporting, a visitor will be identified by 'Visitor #NNN' if no contact was created or assigned to the visitor when the chat conversation was handled.

41. How can I identify a customer?

The visitor identification can be done manually or automatically based on how you get the contact information. The possibilities are:

- Contact is created or identified manually when the data is provided by the visitor in one of two ways:
- Asking for contact information during the chat conversation: The visitor will provide the requested information, and the agent will populate the Contact Details card and then save it as a new contact or merge with an existing one.
- Using a pre-conversation form to collect the visitor's name, phone number, and/or email address: The visitor will fill in the requested information in the chat widget's initial screen, and the agent will validate the information that was populated in the Contact Details card and then save it as a new contact or merge with an existing one.

In these scenarios, if the same visitor contacts again and the same contact information is provided, Talkdesk will not identify the visitor automatically.

Note: *The contact is not created automatically to allow agents to verify the reliability of the information provided. This step is essential as there is no prevention in place for incorrect or mistaken contact details entered by users in the pre-conversation form, including the possibility of entering someone else's contact information.*

- Contact is created or identified automatically when the data is provided by your system by receiving the contact information from your website, using the Chat User Identification feature.

This feature allows you to send Talkdesk the email address or the phone number of the visitor through a designated variable in the chat widget's code. When the visitor initiates a chat conversation, the system receives the visitor's phone number or email address and automatically saves it as a new contact or matches it with an existing contact.

In this scenario, if the same visitor contacts again, Talkdesk will identify the contact.

The "Chat User Identification" feature is especially valuable for website sections that demand user authentication. With this feature, you can securely identify the visitor and have confidence that the information being sent originates from the user initiating the chat conversation.

Note: *Talkdesk will only create the contact if the received phone number or email address is in a valid format.*

42. Can I elevate a chat conversation to a voice conversation?

Yes, if a customer initiates a chat conversation, but it becomes necessary to proceed over the phone, agents can easily elevate to a voice conversation within the same view by clicking on the **Click-to-Call** button in the utility bar of the Conversations Screen.

43. Does Talkdesk Chat support HTTP and HTTPS protocols?

Yes, the system differentiates between the two available protocols (HTTP and HTTPS) and does not differentiate between domains that include "www." and domains that do not include "www.". It is possible to remove the protocol information; it will still work for all combinations.

44. How does the Talkdesk chat feature detect and stop cyber threats, and protect the API from being attacked or taken advantage of?

Talkdesk maintains a Vulnerability Management program as part of our Information Security Risk and Management Policy. The Engineering Security team continuously monitors Talkdesk environments for system vulnerabilities and performs scanning on a recurring basis in accordance with Talkdesk policy by using industry standard scanning technologies.

45. Does placing the chat feature on the front of a web page (exposed to non-authenticated users) open up to more chances of attacks?

Yes. If the chatbot is placed on the main page and anyone can access it, the risk of nefarious usage is larger when compared to placing it behind an authenticated site (e.g. the user has logged in, and then they have the chat presented to them).

Our recommendation is setting up different chat touchpoints, one for non-authenticated users and another for authenticated users.

46. How does Talkdesk protect customers from attacks against the chat feature (especially bot based attacks), and specifically related to API based attacks including DDoS?

Talkdesk uses Cloudflare as a DDoS protection.

47. What other types of threats not mentioned here should customers be concerned about and aware of when configuring the chat feature?

The same threats that any internet facing product is subject to. We recommend integrating the chat widgets in your website via iframe.

48. Are there any other security recommendations?

There are a few recommendations that can be easily applied:

- To add another layer of protection and validate that the customer initiating the chat conversation is the same user authenticated on the website, you can send the session's ID. This allows you to use a data dip component in Talkdesk Studio to perform the validation.
- Advise your customers not to send sensitive information such as card numbers or PIN codes. This warning can be included in an automated message, for example. However, it is important to note that agents may still ask for this information, and the customer may choose to provide it. In such cases, the conversation history will record all details provided.

To address specific security messaging concerns, please contact us and describe your requirements and goals. This will enable Talkdesk to better clarify what is possible and to what extent.

49. How is chat touchpoint id identified and authenticated?

The touchpoint ID is unique and should never be altered. The customers can configure multiple different chat touchpoints, and the ID is their unique identifier.

When the user bootstrap a chat in the customer website, the request arrives at Talkdesk backend with touchpoint ID, Talkdesk verifies the state of the touchpoint and matches the domain of the touchpoint with the requester website page.(Refer to [matching rules](#).)

50. What can the touchpoint id do and what specifically is it used for?

The chat-widget uses the touchpoint ID to obtain the configuration information of the touchpoint, such as Customization, Initial form, etc.

Talkdesk backend uses the touchpoint ID to obtain the configuration information of the touchpoint, verify domain and status, trigger studio flow, etc.

51. What would stop someone from copying our touchpoint ID and using it elsewhere?

The touchpoint ID is displayed in the customer's website code. It is not sensitive data and cannot be used elsewhere else.

The touchpoint ID must match the ID inside the widget's code. If the ID embedded in the website is different from the ID in the touchpoint there will be a mismatch of information.

Even if someone gets the touchpoint id and widget's code, it cannot be used elsewhere, it must be used on the specified website page.

52. Is the Chat Widget fully ADA-compliant?

Yes, **Chat Widget V2** is fully compliant with the **Americans with Disabilities Act (ADA)** standards. It includes features such as keyboard navigation, screen reader support, customizable accessibility settings, and real-time compliance monitoring to ensure ongoing adherence to ADA requirements. **Chat Widget V1** does not meet ADA compliance standards. Businesses using Chat Widget V1 should upgrade to **Chat Widget V2** to ensure full accessibility for all users.

SMS

53. How can I enable the SMS channel?

SMS can be enabled as part of the Agent Workspace, allowing SMS conversations to appear within the Conversation app. Admins can enable their SMS touchpoints directly in Channels App. The phone numbers may already exist in the account and be used for Voice, WhatsApp, and SMS, or new numbers can be purchased.

The phone numbers must be SMS capable, which in the US is the most frequent case. In other countries, customers should emphasize this characteristic when requesting

new numbers. To learn more, read the Support article on [Phone Numbers Coverage](#).

54. How are SMS conversations routed and displayed to agents?

Depending on the type of routing we have defined for a given SMS touchpoint (phone number), admins will be able to configure:

- **Simplified Routing** - Admins will be able to select for each touchpoint which queues will receive the SMS conversations. Only agents belonging to at least 1 of these queues (ring groups) will receive the conversations in their inbox. Each conversation will display labels identifying the queues that received the conversation to provide context for the agents.
- **Dedicated Agent** - Another routing configuration for each SMS touchpoint is to define one agent that will have this number as a dedicated line. It means that only this agent will receive the conversations. These SMS conversations will automatically appear in the agent's list of active conversations with the label "dedicated", a special callout to help with prioritization.
- **Studio flow** - The admin can also associate a Studio flow with an SMS touchpoint. Depending on the Studio flow configuration, the conversation can have manual or auto-acceptance. With the manual option, the agent will receive the SMS similarly to a voice call, in which the agent will have to accept or reject. With the auto-accept, the conversation will appear in the agent's list of active conversations.

Bear in mind that for each touchpoint it is only possible to configure one of the three routing options.

55. How is auto-assigning SMS engagements to dedicated lines useful?

A practical use case for this would be if a company has a multilingual agent responsible for handling inquiries associated with a specific Support line phone number that caters to non-English speakers. This feature can help ensure those inquiries are specifically routed to that agent, so customers are properly prioritized, and no questions get missed.

56. Can I elevate an SMS conversation to a Voice conversation?

Yes, if you initiate an SMS conversation, but the customer wishes to proceed over the phone, you can easily elevate to a voice conversation within the same view with a single click. Click-to-Call icon is accessible through the utility bar of Conversations Screen (bottom of the screen).

57. Can I send and receive MMS?

Yes, it is possible to send and receive attachments through the SMS channel.

Additionally, SMS attachments are available only for United States (US), Canada (CA) and Australia (AUS) numbers. If the touchpoint used to send the attachment is not US/CA/AUS or the contact person's phone is not US/CA/AUS, the attachment's capability will be disabled.

To consult more information, including formats and maximum size supported, please refer to the [Attachments](#) section of this guide.

58. Should Talkdesk SMS be used for campaign use cases?

One of the main purposes of the Digital Engagement's SMS channel is to allow customer care communications where there is a conversation between two participants - agent and contact-person. We don't have the ability yet to send bulk SMS templates that can support use cases of campaigns or notifications. It will be quite time-consuming for the agent to create all these conversations manually, one by one, in addition to bringing the risk of having too many conversations open in their active conversations list, causing their capacity to decrease and affecting the system's performance. For these use cases, it is highly recommended that customers look for alternative Talkdesk products.

59. What kind of phone numbers does the SMS channel support?

The phone numbers may already exist in the account and be used for Voice, WhatsApp, and SMS, or new numbers can be purchased.

The phone numbers must be SMS capable, which is the most frequent case in the US. In other countries, customers should emphasize this characteristic when requesting new numbers. To learn more, read the Support article on [Phone Numbers Coverage](#).

For supported countries (see link above), the SMS channel is available for 10-digit-long code and toll-free numbers. Alphanumeric senders or short code numbers are not yet supported. We don't yet support bringing your own number/carrier capability.

60. Are there SMS opt-outs mechanisms?

Yes. Opt-outs are the revocation of consent from the consumer to receive a message. By default, when a customer sends an Opt-Out message, using the terms:

- "STOP", "STOPALL", "UNSUBSCRIBE", "CANCEL", "END", or "QUIT", it will trigger an automatic standard reply, stating that there was a "STOP" message received and that no other future messages will be sent to that customer number, from that specific SMS company number or list of numbers. The only way that messages can be sent to that number again, is if the end customer sends a subsequent message with "START", "YES", or "UNSTOP".

- If the customer sends “HELP”, then the message reply will feature basic helpful information on how to opt out.

Only single-word messages will trigger the block. So, for example, replying “STOP” will stop the customer from receiving messages from that particular number, but replying “STOP PLEASE” or “PLEASE CANCEL” will not.

Any STOP keyword replies will apply to the entire list of Talkdesk SMS phone numbers. Similarly, a START keyword will disable blocking for the entire list, and allow messages to this recipient once more.

61. Any forbidden message categories for SMS?

Depending on the country of origin and destinations of the phone numbers, there are rules defined by the carriers. It is highly recommended that customers seek information on these same rules in advance (e.g. industries such as gambling, cryptocurrency, loans, and debt collection are often blocked by carriers of certain countries). For cases where SMS can bring risks and limitations, we suggest using another channel, such as Email.

62. How many characters can an SMS message have?

SMS allows up to 160 Characters per “segment”. A message can go over the 160-character limit, but when it does, the telecom carriers will split that message up into segments of less than 160 characters. In most cases those segments will be re-organized in order by the time they reach the end devices, and most modern phones & networks support message concatenation (re-create the large message at the receiving end).

63. Does Talkdesk SMS support Talkdesk Virtual Agent?

Yes, it does through the Virtual Agent component on Talkdesk Studio. The incoming SMS conversation can be assigned to the Virtual Agent component before assigning it to an agent.

64. What if sending SMS using an unverified Toll-Free Number or unregistered US A2P number?

When agents attempt to send SMS using an unverified Toll-Free Number (TFN) or an unregistered US A2P Number, they will receive a notification in the Conversation App stating 'Failed to send message'. Additionally, an email notification will be sent to the admins, detailing the necessary follow-up actions to verify the TFN or register A2P numbers, along with an internal notification in Talkdesk.

Email

65. How can I enable the Email channel?

Email can be enabled as part of Agent Workspace, allowing email conversations to appear within the Conversations app.

66. Where can I manage Emails?

Agents have the ability to receive inbound email messages and initiate an outbound email conversation directly from the Agent Workspace.

67. Can I configure auto-replies in Email?

Yes, you can configure an automated response that will be sent to each customer when they email in an inquiry to let them know someone will be following up shortly. The auto-reply feature can be turned on or off and the text is fully customizable with bold, italics, or underline features. You can even add links to resources such as a help site.

68. What email functionalities are available in Email?

With the Email channel, you will be able to use the following features: Reply, Reply to all, add recipients to CC and/or BCC, forward a conversation, trim content (quoted text), rich text editor (HTML), and Routing - Simplified Routing and Studio options.

69. How does basic email routing work?

Admins can set up basic routing based on ring groups for email accounts. When a ring group matches the email address or touch point the agent has access to, then that agent has access to all conversations being sent to that email address.

70. What type of documents can we attach to Email?

You can add and receive documents, images, and videos.

It is possible to add and receive the following file types: .doc, .docx, .xls, .xlsx, .ppt, .pptx, .pdf, .jpg, .jpeg, .png, .gif, .txt, .bmp, .html, .htm, .mp4, .mp3, .avi, .mov, .ods, .scv, .msg, and .eml.

The total file size must be less or equal to 25 MB.

71. Which email providers are supported by Talkdesk Digital Engagement?

Talkdesk Digital Engagement supports email providers using IMAP/SMTP protocols (e.g., Gmail, Outlook, Yahoo, AOL, and others). If those providers are not available on the cloud, specific access to customer's servers can be granted (e.g., when using VPN). Customers can whitelist our IP's in the VPN to allow Talkdesk service through.

Social Messaging

72. Is Social Messaging available in Talkdesk Digital Engagement?

The Social Messaging channels - Facebook Messenger and WhatsApp Business - are available in the Early Access (EA) Phase.

73. Why should I add Social Messaging Channels?

More than 60% of all customer service engagements will be delivered via digital and self-serve channels, like social messaging, by 2023 according to a Gartner study. Social messaging has transformed the way people interact with brands, and this is only accelerating. Adding Social Messaging Channels to Talkdesk Digital Engagement will not only provide more ways (channels) to build brand awareness and connect with existing customers but also generate new leads. As importantly, you will be able to connect with your customers in their preferred channels.

74. Where can I manage Social Messaging conversations?

Agents can receive inbound messages on the Conversations App, from Agent Workspace.

Conversations will be routed to agents depending on the routing configurations admins define for each touchpoint on Channels App:

- Simplified Routing - Admins will be able to select for each touchpoint which queues will receive the conversations. Only agents belonging to at least 1 of these queues (ring groups) will receive the conversations in their inbox. Each conversation will display labels identifying the queues that received the conversation to provide context for the agents.
- Studio flow - Admins can also associate a Studio flow with a touchpoint. Depending on the Studio flow configuration, the conversation can have manual or auto-acceptance. With the manual option, the agent will receive the conversation similarly to a voice call, having to accept or reject it. With auto-accept activated, the conversation will appear in the agent's list of active conversations.

Bear in mind that it is only possible to configure one of the two routing options for each touchpoint.

75. Can Agents initiate outbound Social Messaging conversations?

For now, it is not possible for agents to initiate outbound Facebook Messenger or WhatsApp Business conversations.

76. Can I deflect a Voice conversation to a Social Messaging conversation?

Yes, it is possible for a contact person to initiate a voice call and switch to a conversation on Facebook Messenger or WhatsApp Business. This scenario can be very useful to prevent a contact person from wasting too much time on hold if the line is busy, for example.

There is a shortened URL service operated by Meta that redirects users to a conversation in Messenger or WhatsApp. Customers can use them on their website, email, SMS, chat, templates, and more. In an incoming call, for example, we can configure an IVR so that if the contact selects an option the call can be disconnected and an automatic SMS sent with this URL.

- For Facebook Messenger: http://m.me/<page_name>, where page_name is the handle of the Facebook page the app is linked to.
- For WhatsApp: <https://wa.me/<number>> where the <number> is a full phone number in international format. Omit any zeroes, brackets, or dashes when adding the phone number in international format.

77. What formats are supported in Social Messaging messages?

We currently support text, emojis (send and receive) and attachments (images, audio, video, documents, etc.). For more information, including file types and sizes allowed for each channel, please consult the following [article](#).

78. Do Social Messaging channels support Bots or Talkdesk Virtual Agent?

WhatsApp channel supports Talkdesk Virtual Agent component on Talkdesk Studio. The incoming WhatsApp conversation can be assigned to the Virtual Agent component before assigning it to an agent.

Facebook Messenger does not support Virtual Agent yet.

79. Do Social Messaging channels support integrations?

Yes, as with other digital channels, you can use Talkdesk Integrations and, based on the events of "messaging conversation ends", "messaging conversation starts", "messaging conversation assigned", trigger actions (such as automatic email sending, opening a Zendesk case, etc.).

WhatsApp

80. What is the WhatsApp 24-hour session rule (session messages)?

WhatsApp is a highly-regulated channel and there are common key concepts and terms that we will encounter when using the WhatsApp Business, one being the "24-hour window" or "24-hour session", an important rule to ensure messages are properly delivered.

WhatsApp regulates when and how brands can send messages to their end users. Whenever a contact person messages a brand on its WhatsApp number, this starts a 24-hour session window. While this session is open, agents can exchange unlimited messages with the contact-person. Whenever the contact person sends a new message, the 24-hour period restarts.

However, once the 24-hour period is over (if the contact person becomes unresponsive), WhatsApp blocks the conversation and the agent is no longer able to send new messages (only when the contact person responds and the 24-h period restarts). This can lead to a big hassle in replying to customers, for example, if the brand receives a lot of support queries on a weekend that may only get replied to when the team is back on Monday.

According to WhatsApp rules, after the 24-hour session expires, the brand will only be able to contact through pre-approved templates (approval required by WhatsApp).

For the Talkdesk WhatsApp channel, we do not yet support outbound scenarios and/or template messages.

To avoid running the risk of agents having messages blocked when the 24-hour session expires, we are blocking the agent's text editor in these situations. This way the agent is notified that the session has expired and can leave the conversation open, for when the contact-person responds again (and the text editor will be unlocked again) or the agent can close the conversation.

Soon, we plan to support templates so that agents can send these types of messages when the session expires.

81. What countries can I reach with the WhatsApp channel?

All WhatsApp-enabled phone numbers have the ability to communicate with WhatsApp end users in any supported country. This is enabled by default, without the need to adjust any settings.

For example, a business based in Germany may choose to enable a German number for WhatsApp. If the business also has customers in France and Austria, this is no problem – they can reach these users via their German WhatsApp-enabled number. This business could choose to provide a more localized experience by enabling a French mobile number for WhatsApp as well, but it's not necessary to do so.

82. Which Phone Numbers are Compatible with WhatsApp?

The following phone number types are supported:

- Local;
- Mobile;
- National;
- Toll-free (US numbers only).

Due to limitations of certain numbers and WhatsApp's ability to verify these numbers, there are certain specific number types that currently have mixed success rates when activating for WhatsApp:

- Argentina local numbers;
- Denmark mobile numbers;
- Malaysia mobile numbers;
- Netherlands mobile numbers;
- Portugal national numbers (voice-only);
- South Africa mobile numbers;
- Singapore mobile numbers;
- Singapore national numbers (voice-only);
- Toll-Free phone numbers outside the US (domestically reachable only).

83. Does my WhatsApp number need to be in the same country as my recipients?

No, your WhatsApp sender number does not need to match the country you're sending to. Any WhatsApp number is capable of two-way messaging with WhatsApp recipients (sending as well as receiving replies), regardless of country. The only exceptions are end users with numbers from a few countries, such as Iran and North Korea, that WhatsApp has designated as blocked on WhatsApp for Business.

84. What are the blocked countries for WhatsApp?

There is a small set of countries that WhatsApp excludes from communicating with WhatsApp for Business numbers. Phone numbers from the following countries are blocked:

- Crimea (+7978)
- Cuba (+53)
- Iran (+98)
- North Korea (+850)
- Syria (+963)

WhatsApp does not allow businesses in these countries to use this channel. Likewise, WhatsApp end users with numbers from these countries will not be able to send or receive messages from businesses on WhatsApp. This restriction is based on the user's WhatsApp number, not their current location. For example, if a WhatsApp user is

currently located in Jordan, but has an Iranian WhatsApp number (WhatsApp:+98...), this user will be unable to communicate with businesses over WhatsApp.

85. Do WhatsApp Phone Numbers need to be SMS-Capable?

Phone numbers do not need to be SMS-capable to be enabled for WhatsApp messaging. Numbers can be SMS or Voice-capable and will continue to work for these channels as well.

86. Can my Business Name be Displayed as the WhatsApp Sender?

Yes, WhatsApp customers can have their verified company name displayed in place of their WhatsApp phone number in the chat list and chat screens of contact-persons.

87. How can I update my WhatsApp business logo, display name and profile information?

During the WhatsApp enablement process, customers can send us these details for each number to be activated (optional): Business display name, Business Description, Link to Profile Photo, Business Address, Business website, Business email, Profile About.

If customers do not submit this additional information initially, or need to change something, please contact us.

For updates to the profile logo/photo, make sure to use a square JPG or PNG image at least 640×640 pixels in size. For PNG images with a transparent background, the background will be rendered as black.

Regarding the business display name, by default this is the same as the name of the end customer's company that was submitted to Meta. We do not recommend it to be different, as WhatsApp has quite a few restrictions. If there is a need to update the Business Display Name for a specific WhatsApp sender, we'll need to wait for an approval from WhatsApp. Please see the [Meta's Display Name rules](#).

88. Can I use my WhatsApp number with the official WhatsApp mobile/desktop app?

No, it is not possible to use WhatsApp-enabled numbers on the WhatsApp consumer mobile app, desktop app, or WhatsApp Business app.

The official WhatsApp app is intended for use by individuals only. The "WhatsApp Business" mobile app is intended for small businesses, for example a 1-person business where the owner responds to customers from his or her own mobile phone.

The WhatsApp API, that exists for Talkdesk, is designed for use by businesses at any scale, large or small.

89. Can I move my WhatsApp Number to Talkdesk?

Some phone numbers not purchased from Talkdesk may be eligible to use WhatsApp. However, our recommendation is to always start using WhatsApp with a new number from Talkdesk or a number that already exists in the Talkdesk account (already in use for Voice and/or SMS), as we have ownership and do not need to do migrations from other providers that make the onboarding more complex and time-consuming.

90. What use cases and businesses are not allowed to use WhatsApp Business?

WhatsApp has rules and restrictions about the types of use cases and business verticals that are allowed to use WhatsApp for business messaging. WhatsApp also does not allow businesses in certain countries to utilize WhatsApp. For full details, please consult the [WhatsApp Commerce Policy](#).

Some forbidden messaging use cases include:

- Newsletter or subscription-type messaging, including content subscription.

Some forbidden business verticals include:

- Adult content;
- Alcohol,
- Animal sales, including live animals, livestock, or any parts of animals;
- Currency;
- Dating;
- Defense;
- Digital subscription and digital content;
- Drugs or related products;
- Gambling;
- Tobacco;
- Weapons, ammunition, explosives;
- Governments and political organizations (currently, WhatsApp prohibits governments and organizations serving a political purpose from using the WhatsApp API).

91. For WhatsApp Business to work, do customers have to create a Meta Business Profile? And will the business have to be verified?

Yes, customers need to have or create a Meta Business account. The customer should follow [Meta's instructions on setting up a business manager account](#) if they do not have a business account yet. In addition to this requirement and during the onboarding

process, the customer will have to submit their business for Meta verification. This only has to be done once and if the customer has already verified their Meta Business Manager account previously, they will not need to complete this step again. The customer can access the [Security Center](#) page to confirm if it is verified. For more info, refer to [Meta's help article](#).

92. During the WhatsApp enablement process, it asks for the Facebook Business Manager ID. How can the customer find this ID?

To find the Meta or Facebook Business Manager account ID, the customer must access the [Business Settings](#) page on Meta Business Manager. Next, click “Business Info”, below “Business Manager info”, is the ID number.

93. If customers transfer their WhatsApp number to Talkdesk, what happens when a contact-person initiates a voice call on WhatsApp to contact the brand?

After enabling this channel, the number will be supported by WhatsApp Business API. A contact person will not see the call or group buttons in the app for these types of WhatsApp accounts, and will only be able to send messages. However, if the number has voice capabilities, the contact person can continue to make calls to the brand (but not via the WhatsApp app).

94. Do customers need one WhatsApp number per country?

All WhatsApp-enabled phone numbers have the ability to communicate with WhatsApp end users in any supported country. For example, a business based in Germany may choose to enable a German Twilio number for WhatsApp. If the business also has customers in France and Austria, this is not a problem – they can reach these users via their German WhatsApp-enabled number. This business could choose to provide a more localized experience by enabling a French number for WhatsApp as well, but it's not necessary to do so.

95. Is there a maximum limit of WhatsApp Numbers an account can have?

Each account can only be linked to one WhatsApp Business Account (WABA), and each WABA can have a maximum of 25 senders (phone numbers) by default.

Facebook Messenger

96. What are the best practices for the Admin to correctly connect Facebook pages as touchpoints?

The admin that manages Facebook Messenger touchpoints needs to have a Facebook account to login and an Admin role on the Facebook pages that will be connected to the Talkdesk Account. The admin also needs to have the Channels App installed on the account (this is where Facebook pages can be connected to Talkdesk).

It is highly recommended that the same user (Admin) adds new Facebook pages as touchpoints or removes them to the same account, as a Facebook login is necessary in which it recognizes and displays all pages associated with that same Facebook login.

If there are multiple admins adding or removing Facebook Pages on the same Talkdesk account, there is a risk that we may lose connection to Facebook pages that the last admin making connections does not have access to.

If a customer has several accounts on Talkdesk and the same admin is the one who adds/removes Facebook pages in those different accounts, we highly recommended creating a different Facebook user per account and adding these users as Admins of the Facebook pages to connect.

If there is a password change to the Facebook pages, it is also highly recommended that the admin reconnects the pages again in Talkdesk.

97. Can the same Facebook Page be configured as a touchpoint in multiple Talkdesk accounts?

No. Each Facebook page to be used as a touchpoint can only be connected to one Talkdesk account. If the Facebook page is activated on two or more Talkdesk accounts at the same time, we may run the risk of losing conversations.

98. What information about the contact person can we receive in the Conversations App from Meta (Facebook)?

When a contact person initiates a conversation, we will display the contact's username as appears is on Facebook.

Digital Connect

99. What is Digital Connect?

Digital Connect is the set of API endpoints that will allow our customers to leverage all features that the Talkdesk Product can offer (agent experience, unified reporting, configurable routing, automations, etc.) while bringing their own solution to handle the contact person's side (customer's third-party or proprietary external messaging solution).

100. Where can the agents manage the Digital Connect messages coming from third-party applications through the Digital Connect APIs?

Agents have the ability to manage the inbound messages received from the customer's external messaging solution and initiate the outbound conversations with the third-party application directly from the Conversations App in the Agent Workspace, under the Digital Connect channel.

101. What are the current primary use cases for Digital Connect?

- Our customers want to keep using their own third-party or proprietary messaging solution but still want to take advantage of all that Talkdesk has to offer with its single-glass-of-pane experience (e.g. external Chatbot, Secure web/app mail messaging solutions).
- Our partners want to provide a highly-customized experience to their customers while integrating them with our Talkdesk ecosystem.

102. What are the main functionalities available in Digital Connect?

- Ability to start inbound and outbound conversations and send and receive messages between Talkdesk and an external messaging solution.
- Ability to send and receive attachments
- Ability to use templates in Digital Connect.
- Escalate conversation contexts coming from an external messaging solution.
- Touchpoint management with the ability to associate queues (ring groups) to each touchpoint.
- Contact identification through the contact email.
- Unified reporting with the ability to see all messages sent and received (Messaging Contacts dataset and preview of the full conversation).
- Elevate the conversation to a voice call.
- Initiate an inbound/outbound conversation with the conversation subject.
- Allow the conversations to be closed via API if the customer wants to allow the conversation to be closed from their messaging app.
- Transfer a conversation to a different agent, either to another queue or to the original queue.
- Simple and advanced routing (Studio).
- Add Notes & Dispositions.
- Conversation closed by 3rd Party: Ability to allow the conversations to be closed via API if the customer wants to allow the conversation to be closed from their messaging app.
- Subject on Digital Connect (Inbound & Outbound): Conversation subject showing in Digital Connect conversations. Ability to initiate an inbound/outbound conversation with the conversation subject.
- Automation on the creation or at the end of a Digital Connect conversation.

- Digital Connect data in Explore API: Ability to use Explore API to send Digital data into an external system (Datasets: [Messaging Contacts](#), [Messaging Traffic](#)).

103. Is Digital Connect available in all regions?

Yes. Digital Connect is available in US, EU and CA.

104. Does Digital Connect require development effort to integrate the customer's third-party/custom messaging solution with Digital Connect APIs?

Digital Connect APIs will require some implementation work on the customer side, so customers should be aware that they will need a technical team/provider to build the middleware that connects the 3rd party messaging solution APIs and Digital Connect APIs.

105. Can the message context/content generated in the third-party application be escalated to Digital Connect?

Yes, the conversation context/content coming from an external messaging app (e.g. messages exchanged between the contact person and the third-party chatbot) will be escalated to Taldesk, and it will be shown in the Digital Connect Conversation.

106. Can the message context/content generated in the third-party application be reported on Talkdesk Explore reporting?

Yes, the conversation context/content coming from an external messaging app (e.g. messages exchanged between the contact person and the third-party chatbot) will be represented on Explore Reporting (historical data).

In order to see the data from the external messaging app (e.g. when did the conversation start on the 3rd party, when was it escalated, which messages were sent, etc.) you can consult the Messaging Contacts dataset or go directly to the Digital Contacts default report inside Explore. On the "Conversation" field, is a link for the full conversation history, which will contain all messages sent and received prior to the escalation to Talkdesk.

Please bear in mind that only conversations that are escalated to a Talkdesk flow will be reported - if the conversation starts on the 3rd party solution and never reaches Talkdesk, we will not be able to report them on Explore reporting.

107. Can agents receive/send multiple inbound and outbound Digital Connect conversations?

Digital Connect can support multiple inbound conversations coming from the same contact person under the same touchpoint (as long as the conversations have different

Interaction IDs). However, it does not support multiple outbound conversations from the agent to the same contact person under the same touchpoint. The reason why this is not permitted is to prevent clients from receiving messages on different topics coming from different agents on the same thread.

108. Does Digital Connect support Talkdesk Virtual Agent?

Yes, it does, through the Virtual Agent component on Studio flows for Digital Connect (only text conversations). The conversation coming from the external messaging app can be assigned to the Virtual Agent component before assigning it to the agent.

109. Is there a way to distinguish the external app which the conversation originated from?

No, at the moment Digital Connect does not allow you to distinguish or filter by the external solution where the conversation originated from. This means that even if the Digital Connect APIs allow the integration of multiple customers' external messaging solutions, all the conversations coming from those different solutions will appear under the Digital Connect channel in Workspace.

We plan to add this ability in the future, but no specific delivery date has been set yet. However, customers can achieve a similar result by configuring specific touchpoints for each of the customers' external messaging solutions that would allow distinguishing and filtering those channels with the touchpoint's friendly name.

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