CONTENTS

About this Document ........................................................................................................ 1
  Overview .................................................................................................................. 1
  Intended Audience .................................................................................................. 1
  Reference Documents ............................................................................................ 1

Introduction ..................................................................................................................... 1
  Current Implementation Architecture ..................................................................... 2

Getting Started ............................................................................................................. 3
  Configuration Steps at a glance ............................................................................ 3
  Configuring Connection to the Pega Text Analytics Engine ............................... 4
  Social Settings on Pega 7 landing page ................................................................. 5
  Access Social Engagement Landing Page ............................................................. 7
  Manage Projects ...................................................................................................... 8
  Manage Connectors to Social Channels ................................................................. 9
  Manage Topics ......................................................................................................... 14

Customer Service Interaction Portal for Social Engagement ....................... 15
  Redesigned Social Page ....................................................................................... 16
  Managing Social Queues ....................................................................................... 16
  Working Social Triage Queue ................................................................................ 19

Enabling Operators to Respond to Social Messages ........................................ 21
  Configuring the System to Respond to Tweets .................................................... 21
  TweetDeck Configurations .................................................................................... 22
  Configuring TwitterOauthClient in Pega Designer Studio .................................. 23
  Authorizing the Operator for Twitter Response from Interaction Portal ........... 24
  Authorizing Facebook Response oauth Client .................................................... 26
  Configuring Social Agent for Conversation Threading ......................................... 29

Appendix: Creating Applications with Twitter & Facebook ..................... 30
  Registering an Application with Twitter ............................................................... 30
  Creating a new Twitter application ...................................................................... 30
  Creating your Twitter Application Access Token ............................................. 32
  Registering an Application with Facebook ......................................................... 34
  Creating a new Facebook application ................................................................. 35

Appendix: Extension points for adding custom queue conditions .......... 38
Overview
This document provides implementation process for PegaCS Social Engagement 7.1.4

Note: The name of Pega’s Customer Process Manager™ (CPM) product has been changed to “Pega Customer Service” (PegaCS), to more accurately reflect Pega’s customer service application strategy and our commitment to the enterprise customer service market. However, the acronym “CPM” is still utilized in rules and other notations within this document and does not impact the functionality of those rules (or referencing rules).

Intended Audience
This guide is intended for Pega Customer and internal users implementing Social Engagement.

Reference Documents

<table>
<thead>
<tr>
<th>PDN Document Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PegaCS 7.1.4 Release Notes</td>
</tr>
<tr>
<td>PegaCS 7.1.4 Upgrade Guide</td>
</tr>
<tr>
<td>PegaCS 7.1.4 Implementation Guide</td>
</tr>
<tr>
<td>PegaCS 7.1.4 Reference Guide</td>
</tr>
</tbody>
</table>
Social Engagement capabilities empower service teams to deliver amazing customer experiences with social tools built right into Pega Customer Service.

- **Listen:** Through Social **listening**, teams can set up connectors to monitor social media channels like Twitter and Facebook for specific keywords and/or social handles. Noise is automatically filtered out to present only the relevant social conversations.

- **Analyze:** Social Analysis guides agents by revealing sentiment, topics, categories, threaded conversations, and influencers using advanced natural language processing.

- **Act:** Teams can act on social conversations by replying in-line to tweets and posts, creating cases based on social interactions, and use social data, like sentiment and Klout score, to trigger workflow and handling.
**Current Implementation Architecture**

The PegaCS Social Engagement stack is integrated with the Pega Text Analytics Engine via RESTful APIs. The text analytics engine is deployed on AWS cloud and is multi-tenant capable. The engine’s database in the cloud stores annotated social conversations (tweets, etc.), and may contain a key to Pega data (Customer ID, Case ID only). No other identifying information is stored on the cloud.

Configuration needed for PegaCS Social Engagement Solution on the text analytics engine is done using Pega 7 landing pages. Some advanced configuration, if at all needed, can be done directly on the Pega Text Analytics Engine Workbench.

**CPM Social Engagement Architecture**

**Note:** The text analytics engine runs in Java. It can be deployed on premise if needed. Pega 7 would still depend on RESTful connectors to communicate with it.
Note: Prior to configuring PegaCS 7.1.4 for Social Engagement, you must obtain API tokens to the cloud implementation of Pega Text Analytics Engine by sending an email request to pegatextanalytics@pega.com.

Configuration Steps at a glance

1. Install and configure PegaCS 7.1.4
2. Request and obtain API tokens to access Pega Text Analytics Engine
3. In Designer Studio, map Pega Text Analytics Engine API token values in SocialSettings RuleSet
4. Create a new social project from the Social Landing page
5. Create/Register new apps with Twitter, Facebook, and YouTube using corresponding accounts
6. Create at least one connector under the project you created in Step #5 (example: Twitter Streaming Connector to stream tweets from the timelines of the Twitter account you would like to monitor). Start the Connector(s).
7. OPTIONAL: Setup Topics and Taxonomy
8. Launch the Interaction Portal from designer studio. Navigate to Social screen from the left navigation in the interaction portal.
9. Create a new social queue. Make sure to select the project you created in step #5 as the project filter. Select other filters as necessary.
10. Send a few test tweets mentioning the Twitter handle you have chosen to monitor. Create test posts/comments on Facebook/YouTube as necessary.
11. You should see your test tweets appear on the social queue
12. To authorize response oauth client, select preferences from the profile drop down in the interaction portal. Select Twitter under authorization. Next to the oauth client label, make sure “TwitterOAuthClient” is selected from the smart dropdown. Click on authorize. Make sure you login to the Twitter account you want to use for responding to the incoming Tweets. This is usually the same Twitter account that you have chosen to monitor.

Each of these steps is illustrated in detail in the subsequent sections.
Configuring Connection to the Pega Text Analytics Engine

From the Pega 7 Designer Studio, checkout the SocialSettings mapvalue, found under PegaFW-Admin-SocialSettings, to enter the following values.

**CPM Social Settings**

![Pega 7 Designer Studio](image)

**Mapping Pega Text Analytics Engine API Token values**

- Obtain the server URL from the Pega Text Analytics admin. Enter the URL in "MLServerURL" field.
Enter or replace “ML_APIId” and “ML_APIkey” with the values sent to you by the Pega Text Analytics admin
Do not change “ML_RowCount” value

Save the changes. This completes the settings for communicating with the Pega Text Analytics Engine.

**Social Settings on Pega 7 landing page**

Before you can start using the PegaCS Social Engagement capabilities, you would need to configure a few more items in Pega 7. Here are the key concepts associated with these configurations.

**Projects:** A project is a logical container that holds the social conversations that are harvested. A project also holds associated connectors, topics, and taxonomy. Project parameters control several aspects of the linguistic processing and sentiment analysis. You can create as many projects as you would like.

**Pega Text Analytics Configuration Items**

- **PROJECT**
  - CONNECTORS
  - TOPICS (Optional)
  - TAXONOMIES (Optional)

**Connectors:** The Pega Text Analytics Engine has built-in connectors to various web and social channels. These connectors make use of public APIs of the social channels.

For PegaCS 7.1.4, you can configure the following three connectors:

- Twitter Streaming
- Facebook Page Search and
- YouTube Video Comment Search

Connectors harvest data based on the configured keywords (search parameters). Specifying the right keywords requires a little bit of thought into it. A poorly defined keyword set could either fetch irrelevant conversations or block important conversations. The following tips might help you identify the right keywords:

- Consider your brand name or product name
- Consider various ways you brand is spelled or misspelled.
- Consider including all the different ways your customers recall or mention your brand in social media.
- Relevant Twitter handles

**Topics:** This is a unique set of keywords about a company, brand, department, organization, line of business, or subject that is of interest to you. Topics are ideal for filtering the harvested data. For example, a retail bank could set up topics such as “Address Change”, “Checking Account”, “Credit Card” etc.

**Taxonomy:** Taxonomy is a hierarchical or poly-hierarchical listing of topics or subject categories. Think of it as a tree structure, with each leaf or category defining a topic or subject. Taxonomy is useful in categorizing large collection of content, in this case social conversations, into useful subjects or topics. Each category has Boolean rule definition associated in the form *should, and, must* words for the rules-based categorizer.

Pega Text Analytics engine makes use of taxonomy for spam filtering. A special category can be defined in taxonomy to define spam-filtering rules.

**Note:** In PegaCS 7.1.4, taxonomies are developed and edited in Microsoft Excel. There is a specific format in which the taxonomy has to be defined. A template is available for download from the taxonomy tab of the landing page.
Access Social Engagement Landing Page

2. Login with provided credentials
3. Click on DesignerStudio and then select Social Engagement > Projects

4. You are navigated to the Social Engagement Landing Page
Manage Projects

To add a new project, click the add icon on the Projects tab of the landing page.

- Get Klout Scores: Ensure this option is checked to harvest Klout scores for all Twitter users. You will also need to enter Klout API Key. If you have not registered with Klout for API access, you can do so by following instructions at: http://developer.klout.com/member/register

- Detect and Remove Spam: Check this box only if you want the spam filters defined in the associated taxonomy needs to be used

Add Project

![Add/Edit Project](image)
Manage Connectors to Social Channels

To add a new connector, click the add icon on the Connectors tab of the landing page. Make sure you have selected the project under which you want the connector created.

Twitter and Facebook connectors should be configured with their own application API tokens.

**Twitter Connector:**

Twitter connector can be a search type or streaming type.

The streaming type connector streams the tweets matching the search string in real-time from the timeline you choose.

The search type connector fetches usually tweets from the past week. It’s important to know that the Search connector is focused on relevance and not completeness. This means that some Tweets and users may be missing from search results.
Twitter Connector


You can also follow these links to directly jump to creating new apps.

Twitter: https://apps.twitter.com

Facebook: https://developers.facebook.com/docs/web/tutorials/scrumptious/register-facebook-application

YouTube: No need to register an app
Facebook Connector:

PegaCS 7.1.4 is compliant with Facebook Graph API v2.x. A Facebook app is needed to configure the Facebook connector.

In the past, if you ever created a Facebook app, there was no approval process. But now, new custom Facebook Apps are required to go through a lightweight approval process. Facebook can take 7-14 days to approve your app. So, please plan your implementation project to account for this approval.
process. You can learn more about the Facebook App approval process here: https://developers.facebook.com/docs/opengraph/submission-process

If you are a Pega solutions consultant and are setting up your system for a demo or PoC, please send an email to pegatextanalytics@pega.com requesting a test Facebook app. The PegaCS Social Engagement Team already has created a custom Facebook app for demo and test purposes that has been approved by Facebook. You will receive your Facebook App ID and Secret in the email.

Harvesting and responding to Facebook posts, including messages, replies, and private messages from/to multiple pages is supported in PegaCS 7.1.4. In addition to the Facebook app ID and Secret, you will need Facebook page access tokens for harvesting private messages sent to your Facebook page.

Where to find Facebook Page Access Token(s)?

Open "SampleFBDefinition" record in the designer studio. You need to complete the authorization step in step #3 described later in the guide under “Authorizing Facebook Response oauth client”. Copy the page access token for the page you would like to set up the connector.
Facebook Authorization Resource Instance

You are authorized

Authorization
Application ID
647940138684365

Application Secret
a70ef446af3b0eb5346d0e45a22d5c4c

Access Token
CAAJkRhejNzBoBAGSSQjufipJlIHEIlbGjghZAWIkdc9VvbazBUZAXye62z7v3W

Authenticated User ID
698699420240803

Authorize De-Authorize

Page Tokens

<table>
<thead>
<tr>
<th>FB Page Id</th>
<th>Page Name</th>
<th>Page Access Token</th>
</tr>
</thead>
<tbody>
<tr>
<td>373711116153364</td>
<td>Test Business UK</td>
<td>CAAJkRhejNzBoBAGSSQjufipJlIHEIlbGjghZAWIkdc9VvbazBUZAXye62z7v3W</td>
</tr>
<tr>
<td>676472402406128</td>
<td>Test Business USA</td>
<td>CAAJkRhejNzBoBALHZANBGaXh27nw7GZAtqdfmaTH5tRo4Tw7nNkkkD9N1lisy99cSAA53im9</td>
</tr>
<tr>
<td>812413108848378</td>
<td>Test Business Global</td>
<td>CAAJkRhejNzB0A0jSNwlcbggygB6tFplzID0DxEvD6iKOnqTuov2FCFU1Kb9OqCtaEQ51F29ByC</td>
</tr>
</tbody>
</table>

YouTube Connector

Add/Edit Connector

- COMMON PARAMETERS

Connector name:
Uplusbank Youtube

Connector type:
YouTube comment search

Search query for Youtube comments:
Uplusbank

- SPECIFIC PARAMETERS

Ignore content by authors:
Manage Topics

To add a new Topic, click the add icon on the Topics tab of the landing page. Make sure you have selected the project under which you want the Topic created.
Follow the steps to open Social engagement customer portal

1. From application home page, select Launch > CPM 7 Interaction Portal

2. You are directed to Customer Service interaction portal window. Select Social from the left navigation panel.
Redesigned Social Page
The social engagement page has been redesigned to provide superior user experience to the CSRs.

Managing Social Queues
Follow the steps to add a new social queue, on the Social Interaction Portal

1. Click on icon located next to Social Queues in the right navigation panel.
2. To create a new queue, click Add.
3. The Create a queue dialog box opens, it has three tabs.
   General tab: Specify the queue name (required), project from which harvested social messages are to be shown in the queue (required), date range (optional), specific social network sources (optional – if left blank, conversations from all sources are presented in the queue) and workgroup or groups that can access the queue.
A queue can be made active or inactive by checking or unchecking the **Make queue active** box. An inactive queue will not be displayed to the user on the right navigation.

**Conditions Tab:** In this tab, capture all the conditions you would like to apply on the social conversations. Think of conditions as filter criteria you can apply on harvested social conversations. Only those social conversations that match the specified conditions will be shown in the queue.
**Actions Tab:** On the actions tab, you can direct the system to create cases automatically for social conversations that match the conditions defined in the **Conditions** tab. Cases created automatically can be assigned to an operator’s worklist or workbasket.

Case Queues provide the ability to create cases automatically for incoming social messages if certain pre-defined conditions are met. A case created automatically can be configured to be assigned to an operator’s worklist or to a workbasket.
Working Social Triage Queue

Social queue provides a list of incoming social conversations that match the filter criteria in the queue definition.

The following are the key visual indicators for the CSR to triage and act on each message:

1. Traige Queue Name
2. Conditions applied to the queue
3. Additional Filter and Sort By Options
4. Detected Sentiment Icon
5. Source Icon (Twitter, Facebook etc.) and Customer Value
6. Customer Name (if customer is a known or identified customer). Screen Name if customer is unidentified
7. Customer Social History: Opens a pane providing previous Tweets, Facebook posts by the customer
8. Influence Score (Klout Score)
9. Response Icon: When clicked opens the response pane as shown above
10. Retweet or Like
11. More options: Provides menu options to Start an Interaction, Escalate, or Mark as “No Response Required”, Spam, Junk, and Already Resolved.
12. Reply As: Provides a drop down to choose a Twitter accounts to be used for response
13. Option to choose from pre-formatted responses
14. Checked automatically if incoming message is Private or Direct
15. Knowledge Search (Works only if KM is enabled, configured, and has stored relevant content)
16. Response area
Enabling Operators to Respond to Social Messages

Configuring the System to Respond to Tweets

The solution provides capability to configure the system to respond from multiple Twitter handles. The Social Admin can map incoming Twitter handles to Outgoing Twitter handles.

For example, tweets mentioning @handleA can be set up to respond as either @handleA or @handleB (assuming @handleA and @handleB are owned by your organization). This mapping can be set up by navigating to Twitter Handle Mappings from Data in Pega 7 Designer Studio.

Getting to Twitter Handle Mappings

Configuring Incoming and Outgoing Twitter Handles

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PegaCS Social Engagement Implementation Guide
TweetDeck Configurations

In order to enable your team of operators respond on behalf of your organization using official service handles, our solution relies on capabilities provided by TweetDeck, a service provided by Twitter. TweetDeck Teams is a simple solution to Twitter account sharing. It enables you to delegate access to as many people as you like, and remove accounts when they no longer need access. In order to use this new feature, you must log in to https://tweetdeck.twitter.com with your corporate Twitter account. If you are not familiar with TweetDeck, we encourage you to familiarize yourself with its concepts and features. A complete description of TweetDeck’s capabilities is beyond the scope of this guide.

TweetDeck

For more information on how to setup Tweetdeck for teams, please look up this blog: https://blog.twitter.com/2015/introducing-tweetdeck-teams
Configuring TwitterOauthClient in Pega Designer Studio

The Twitter “API key” and “API Secret” of the twitter app that is used to respond to the customer tweets need to be copied to the default “TwitterOauthClient” instance. Copy and paste these values from the Twitter App to the TwitterOauthClient record in Pega designer studio.

Twitter App

![Twitter App Settings](image)

TwitterOauthClient

![TwitterOauthClient Settings](image)
Authorizing the Operator for Twitter Response from Interaction Portal

- To authorize response oauth client, select Preferences from the profile drop down in the interaction portal.

- Select Twitter under authorization. Next to the oauth client label, make sure “TwitterOAuthClient” is selected from the smart dropdown.

- Click Authorize. Each operator/CSR uses his/her own Twitter account credentials to authorize the app. Make sure the CSR Twitter account is added as a contributor in TweetDeck for your handles.
You will need Read/Write/Access to Direct Messages Permission on your Twitter app in order to respond from within CPM to incoming Tweets. (Twitter will require mobile number be associated with the Twitter account for application permissions other than Read Only.)
Authorizing Facebook Response oauth Client

1. By logging into the Facebook account that owns the Facebook page you wish to monitor, make sure that the page URL you configured in the connector-landing page is correct.

   Facebook URL should match with what is configured in the connector

2. From your Facebook App page, navigate to Settings > Basic tab. You should see the configurations similar to the screenshot below.

   Facebook App Settings
3. Update the Facebook Authorization resource "SampleFBDefinition" with the application ID and Secret obtained from the Facebook App Page.

Click the Authorize button. The system will automatically fetch the access tokens and page access tokens for all pages your Facebook for business account has claimed ownership.

**Facebook Authorization Resource Instance**

![Facebook Authorization Resource Instance](image)

**Note**: If you create a new data instance for FB authorization, please mention the same in the "SetSocialSettings" Data transform.

4. Authorization your desktop for responding to Facebook conversations via the desktop preferences in the CPM Interaction Portal
Facebook Authorization From Desktop Preferences

![Image of Facebook Authorization From Desktop Preferences]

- Application ID: 367754860944657
- Application Secret: [Obfuscated]
- Access Token: [Obfuscated]
- Authenticated User ID: 1531118430428888

[Buttons: Authorize, De-Authorize]
Configuring Social Agent for Conversation Threading

CPM 7.1.3 provides conversation-threading capabilities. This provides agents with a single thread of relevant conversations and immediate context and meaning across channels to deliver effective service.

Specialize the CPM-Social Agent that is shipped OOTB with the following changes. Enable the *Process Threaded Documents Agent.*

Enable social agent for threading

![Image of CPM-Social Agent configuration](image)

Update the access group so that the agent has access to the updated social settings map value.

Configure access group

![Image of CPM-Social Agent security configuration](image)
Appendix: Creating Applications with Twitter & Facebook

Registering an Application with Twitter

This guide walks you through the steps of registering an application with Twitter you would need to configure PegaCS Social Engagement. Assuming you already have a Twitter account, registering the application is the first step.

Creating a new Twitter application

After signing into your Twitter account, visit http://apps.twitter.com. You should see the following page. If you already have applications, you will see a list of applications created.

Click the Create New App button near the top. A new page with the Create an application form requires basic information about your application.

Create an application

Application Details

Name *
valubank_Social_Service

Your application name. This is used to attribute the source of a tweet and in user-facing authorization screens. 32 characters max.

Description *

Application for harvesting Tweets from Upstate Bank Timeline

Your application description, which will be shown in user-facing authorization screens. Between 10 and 255 character max.

Website *

http://www.valubank.com

Your application’s custom accessible home page where users can go to download, make use of, or find out more information about your application. This mal- formatted URL is used in the source attribution for tweets created by your application and will be shown in user-facing authorization screens.

If you don’t have a URL yet, just put a placeholder here but remember to change it later.

Callback URL

Where should we return after successfully authenticating? OAuth 1.0a applications should explicitly specify their oauth_callback_url on the request token step, regardless of the value given here. To restrict your application from using callbacks, leave this field blank.
In the Name field, name your application in 32 characters or fewer.

In the Website field, give a URL that points the user back to your application, where they can download it or find out more information. As with Name and Description, this field is presented on user-facing authorization screens.

The Callback URL field can specify the URL where Twitter should redirect after a successful authorization. It is best to leave this field blank and to explicitly specify the callback URL at authorization time.

The developer Rules Of The Road section outlines rules you must agree to follow to build an application that uses Twitter’s API.

If you agree to the rules, check Yes, I agree.

Click Create your Twitter application to complete the form and go to the application settings page.

After the application is created, you will be presented with a page with multiple tabs.
Creating your Twitter Application Access Token

Click on the Keys and Access Tokens Tab.

Click the button near the bottom of the page. Creating your access token here, will enable you to make API calls. The access token generated will be assigned your application’s current permission level (default is read permission). After the access token is created, you should see the status at the top of your page.

You should also be able to see the Access Token at towards the bottom of the page.
Now it is time to test the OAuth Token. Click on the **Test OAuth** button displayed at the top-right corner of the page. The OAuth Tool page will be displayed. These four fields shown are what you would need for configuring the Twitter connector.
Registering an Application with Facebook

This guide walks you through the steps of registering an application with Facebook you would need to configure CPM Social Engagement. Assuming you already have a Facebook account, registering the application is the first step.

In the past, if you ever created a Facebook app, there was no approval process. But now, new custom Facebook Apps are required to go through a lightweight approval process. Facebook can take 7-14 days to approve your app. So, please plan your implementation project to account for this approval process. You can learn more about the Facebook App approval process here:

https://developers.facebook.com/docs/opengraph/submission-process

Make sure you request the following permissions and approved:

**manage_pages**
Enables your app to retrieve access_tokens for Pages and apps that the person administrates

**public_profile**
Provides access to a person's basic information, including first name, last name, profile picture, gender and age range. This permission is approved by default.

**publish_pages**
Gives your app the ability to post, comment and like as any of the Pages managed by a person using your app.

**read_page_mailboxes**
Provides the ability to read a Page's inbox, conversations and messages using a Page access token obtained with the manage_pages permission.
Creating a new Facebook application

After signing into your Facebook account, visit http://developers.facebook.com. You should see a page with “Apps” top menu.

From the “Apps” top menu drop down, click on Add a New App.

Choose Facebook Canvas from the list of platforms.
Enter the name of the app.

Enter the URL where CPM is deployed and click *Next*.

Just follow the quick start wizard till *Finished*.

From the *Apps* Top Menu, Select the App you just created. You should see the following page.
Note down the App ID and App Secret (Click on Show to see the secret token). These values will be needed for configuring the Facebook connector in your project.
Appendix: Extension points for adding custom queue conditions

As an implementation engineer, you can add conditional fields to the Add/Edit Queue modal. The extension points and the steps to achieve this are explained below.

1. From the designer studio, look for LoadAddtlSocialCriteriaList data transform extension point from LoadSocialCriteriaList(first dropdown)

Append the criterion you would like to add to the results as shown above in the first dropdown of conditions tab.

- a. Set pyLabel → name in the dropdown
- b. Set criteriaId → id of the criterion which needs to be compared with criteriaName in LoadSocialCriteriaValues DT
- c. Set metadataFlag → if true, it is a metadata to Pega Text Analytics Engine (e.g. Sentiment) and hence sent to their API. If false, it is CS data (e.g. Customer Value)
- d. Set multiselectFlag → if true, it can be set to multiple values for each queue. Else, it can only be mapped to a single value

2. PopulateAddtlFilterConditions Data Transform (2nd dropdown)
To populate the second dropdown → append filter conditions with your particular criterion name (For date, we have ‘Before’ and ‘After’ as filter conditions)

**Note** - criteriaName is equal to criteriaId in the LoadSocialCriteriaList DT

3. **LoadAddtlSocialCriteriaValues DT** → extension point from **LoadSocialCriteriaValues** (**3rd** dropdown)

![Data Transform: Load Social Criteria Values [Available]](image)

Append the new criterion values to the results as shown above to show them in the **third dropdown** of conditions tab. (e.g. Positive, Negative, and Neutral to Sentiment criterion)

**Note** – param.criteriaName is equal to criteriaId in the LoadSocialCriteriaList Data Transform

4. Now that we have got the UI ready (all 3 dropdowns), we need to consume this criterion. To do so:

a. Map the data onto the results, only if it is CS criteria (e.g. customer values are mapped onto the results based on the customer id of the tweet/post)

   **MapCSData** activity is the extension point which can be used to map CS specific data onto the document

b. Filter the results based on the new criterion (If the new criterion is ‘Platinum’ customer, show only customer posts whose value is Platinum)

   To apply the CS specific criterion on the received content, we have an activity **CPMApplayCSCriteria** plugged for both triage and case queues. It has an extension point activity **CPMApplayCustomCSCriteria** which runs on each document. Based on the custom criteria defined, we need to set isVisibleOnGrid to false in that activity, so that the unmatched documents don’t appear on the grid (for triage queue) or will not have a case created (for case queue).