Contents

CX Cloud External Routing for Salesforce Service Cloud Installation Guide

Prerequisites

Before you proceed with the installation, ensure that the following features are activated in your Salesforce organization:

- **Omni-Channel**
- **Service Cloud Voice**

You must also have the CX Cloud from Genesys and Salesforce installed. This package can be found on Genesys AppFoundry and is also available on the Salesforce AppExchange.

To verify and enable the required settings in Salesforce:

1. Go to the setup screen in Salesforce and search for `Omni-Channel Settings`. Ensure that the `Enable Omni-Channel` checkbox is selected.
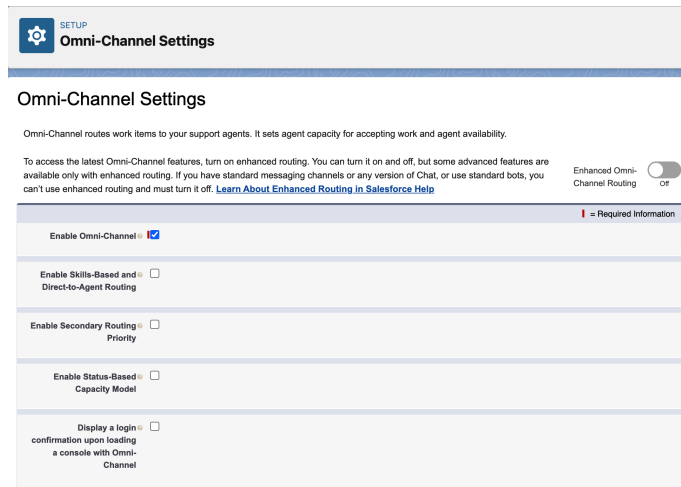

Figure 1: Enable Omni-Channel

2. Next, search for `Partner Telephony Setup`. Make sure the `Turn on Voice with Partner Telephony` checkbox is selected.

Service Channel

To create a service channel in Salesforce, follow these steps:

1. **Navigate to the Service Channel Settings:**
   - Go to the Salesforce setup screen.
   - Use the search bar to find `Service Channel`.
2. **Create a Service Channel:**
   - Click on `Service Channel` to open the configuration page.
   - Follow the detailed instructions provided in the Salesforce guide on creating service channels.

By setting up a service channel, you enable efficient routing of cases, messages to the appropriate agents, enhancing your customer service operations.

Configure the Genesys Integration Details

To configure the integration details for Genesys Cloud within Salesforce, follow the steps below. This configuration will enable seamless integration between Genesys Cloud and Salesforce, ensuring smooth operation of features that require authentication and routing settings.

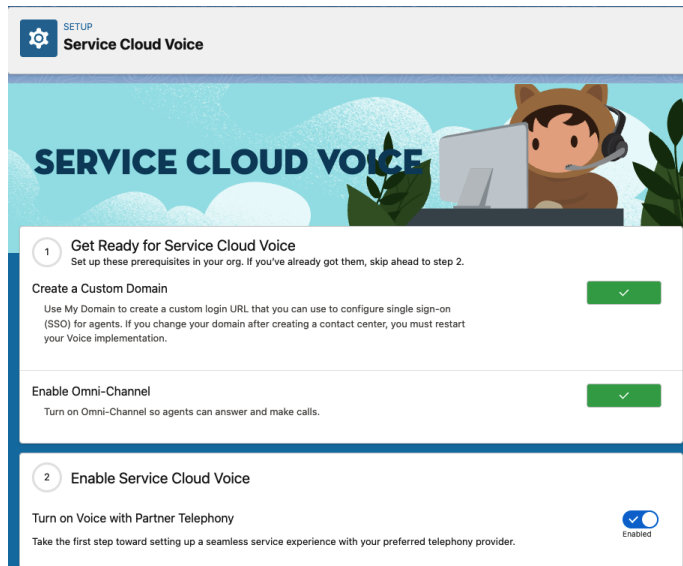1. **Access the Configuration UI:**
   - In Salesforce, go to `Setup`.

Figure 2: Enable Partner Telephony

- Search for `Visualforce Pages` in the Quick Find box.
- Locate and select the relevant Visualforce page for configuring the Genesys integration.

OAuth Setup

Some features in Genesys Cloud for Salesforce require OAuth authentication. To set up OAuth, follow these steps:

1. **Open Integration Settings:**
   - On the Visualforce page, navigate to the `Integration Settings` section to manage OAuth configuration.
2. **Edit Authentication:**
   - In the Authentication section, click `Edit`.
   - Enter the `Client ID` and `Client Secret` from your OAuth client in Genesys Cloud.
   - Click `Save` to store these credentials securely.
3. **Select Genesys Cloud Region:**
   - Choose the appropriate Region for your Genesys Cloud organization.
   - If you change the Region, ensure you click `Save` again to apply the changes.
4. **Test the Configuration:**
   - Click `Test` to verify that the OAuth setup is correctly configured.
   - Note: If you change the Region, ensure you save the changes before testing.

Genesys Cloud Implicit Grant Setup for Salesforce

Configuring Redirect URI

To set up the Implicit Grant flow for Genesys Cloud integration with Salesforce, follow these steps:

1. Add your Salesforce redirect URI to the list of allowed redirect URIs in the Genesys Cloud OAuth configuration.

2. The redirect URI should follow this format:

   `https://xxxx.lightning.force.com/resource/genesysps__genesysAuthCallback_ExtRoute`

   Replace `xxxx` with the base name of your Salesforce org.

3. In the example above, the base name is `genesys-1d7-dev-ed.develop`, so the redirect URI in Genesys Cloud should be set to:

   `https://genesys-1d7-dev-ed.develop.lightning.force.com/resource/genesysps__genesysAuthC`

Enabling Popup Authentication

To use the popup authentication method:

1. Ensure that your browser settings allow popups for your Salesforce domain.

2. The authentication process will open a new window or tab for the Genesys Cloud login.

3. After successful authentication, the popup will close automatically, and the main Salesforce window will be updated with the authenticated session.

4. If popups are blocked, the authentication process may fail. In this case, you'll need to allow popups for the Salesforce domain in your browser settings.

Note: Popup authentication provides a smoother user experience and helps prevent issues with browser redirects and token storage. However, it requires that users have popups enabled for the Salesforce domain.

4

Troubleshooting

- If you encounter issues with authentication, ensure that the redirect URI is correctly configured in both Genesys Cloud and your Salesforce org.
- Check your browser's popup blocker settings if the authentication window doesn't appear.
- Clear your browser cache and cookies if you experience persistent authentication issues.

External Routing Settings

To configure the external routing settings and sync data between Genesys Cloud and Salesforce:

1. **Access External Routing Settings:**
   - On the Visualforce page, navigate to the `External Routing Settings` section.
2. **Retrieve Configuration:**
   - Click on `Retrieve Options` to fetch configuration data from Genesys Cloud.
   - The integration will query Genesys Cloud for queues and messaging integrations.
   - It will then sync these objects from your Genesys Cloud organization to your Salesforce organization, ensuring that all necessary routing configurations are up-to-date.
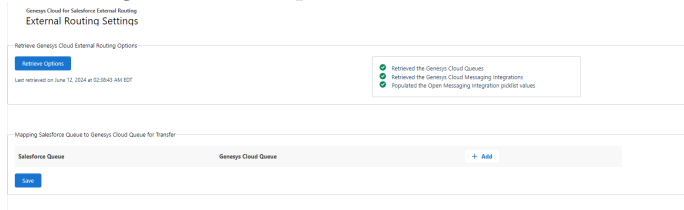
By following these steps, you will set up and configure the Genesys integration in Salesforce, enabling enhanced features and efficient data synchronization between the two platforms.

Create a Routing Configuration

To effectively manage how incoming customer interactions are routed in Salesforce, you need to create a routing configuration. This configuration ensures that interactions are handled according to your specified rules and priorities.

Follow these steps to create a routing configuration:

1. **Navigate to Routing Configurations:**
   - Go to the Salesforce setup screen.
   - Use the search bar to find `Routing Configurations`.
   - Click on `Routing Configurations` to open the configuration page.

2. **Create a New Routing Configuration:**
   - Click the `New` button to start creating a new routing configuration.
3. **Set Up the Routing Configuration:**
   - In the configuration details:
     - **Name**: Enter `ExternalRouting`.
     - **Priority**: Set the priority to `1`.
     - **Routing Model**: Choose `External Routing` as the model.

Figure 3: Routing Configuration

4. **Save the Configuration:**
   - After entering all the necessary details, click `Save` to create the new routing configuration.

By setting up the `ExternalRouting` routing configuration with a priority of 1 and the external routing model, you prioritize these interactions to be managed by external systems like Genesys Cloud, ensuring they are processed according to your integration setup.

Create a Queue

To manage the distribution of work among your agents effectively, you need to create a queue in Salesforce. This queue will utilize the routing configuration you created earlier and handle specific objects. Follow these steps to set up the queue:

1. **Navigate to Queue Settings:**
   - In the Salesforce setup screen, use the search bar to find `Queues`.
   - Click on `Queues` to open the queue configuration page.
2. **Create a New Queue:**
   - Click the `New` button to start creating a new queue.

3. **Configure the Queue:**
    - In the queue configuration form:
        - **Queue Label**: Enter a name for the queue, such as `Customer Support Queue`.
        - **Queue Name**: This will auto-populate based on the Queue Label. You can adjust it if necessary.
        - **Routing Configuration**: Select the `ExternalRouting` routing configuration that you created earlier.
        - **Supported Objects**: Choose the Salesforce objects that this queue will handle. For example, you might select `Cases`, `Leads`, or `MessagingSessions`.

Figure 4: Queue Configuration

4. **Assign Members to the Queue:**

- In the queue members section, add the users, public groups, roles, or territories that should be able to process items in this queue.
- Click `Add` after selecting the appropriate members.

5. **Save the Queue:**
   - After entering all the required details and assigning members, click `Save` to create the new queue.

By setting up this queue and associating it with the `ExternalRouting` routing configuration, you ensure that the interactions routed to this queue are managed according to the defined priorities and models. This setup streamlines the process of handling incoming interactions, allowing for efficient distribution among agents.

Create an Omni-Channel Flow

Creating an Omni-Channel Flow in Salesforce helps automate the routing process for incoming interactions, ensuring they are directed to the appropriate queues and handled efficiently. Follow these steps to set up an Omni-Channel Flow using the provided template:

1. **Access Flows in Salesforce:**
   - Navigate to the Salesforce setup screen.
   - In the Quick Find box, type `Flows` and select it from the list.
2. **Create a New Flow:**
   - Click the `New Flow` button to start creating a new flow.
3. **Select the Omni-Channel Flow Template:**
   - Click on `All + Templates`.
   - Locate and select the `Omni-Channel Flow` template.
   - Click `Next`.
4. **Choose a Flow Type:**
   - Select `Freeform` to build the flow in a flexible layout.
   - Click `Create` to proceed.
5. **Define Flow Variables:**
   - Create the required variables to hold specific data used within the flow. Follow these guidelines from the Salesforce documentation:
     - **recordId**: This variable will hold the unique identifier for the record being processed. Detailed steps to create this variable are available in the Salesforce guide for recordId.
     - **input_record**: This variable will store the record data to be routed. Detailed steps to create this variable are available in the Salesforce guide for input_record.
6. **Add the Route Work Action:**
   - Drag the `Route Work` action from the palette onto the flow canvas.
   - Configure the `Route Work` action:
     - **Label**: Enter a descriptive label, such as `Route Customer Support Request`.
     - **Description**: Optionally, enter a description for this action.

- Set the input values for the action:
    - **RecordID**: Select the `recordId` variable you created earlier.
    - **Service Channel**: Choose the service channel you created for chats.
    - **Route To**: Select `Queue`.
    - **Queue**: Choose the Salesforce queue created on the earlier steps.
- Click `Done` to save the configuration for this action.

7. **Add the Create Records Action:**
   - Drag the `Create Records` action onto the canvas.
   - Configure the `Create Records` action:
       - **Label**: Enter a name such as `Create External Routing Request`.
       - **Number of Records**: Choose `One` to create a single record.
       - **How to Set Record Fields**: Select `Use separate resources, and literal values` to manually set the fields.
       - **Object**: Select `External_Routing_Request` from the list of objects.
   - Set the field values for the new record:
       - **Open_Messaging_Integration___c**: Choose the appropriate value from the picklist retrieved from Genesys Cloud.
       - **Work_Item_ID___c**: Assign the `recordId` variable to this field, which corresponds to the Service Channel object.
       - **ParticipantData_Attributes**: Optionally, include participant data attributies while creating the interaction with Genesys cloud and the values in the format `Attribute1=Value1, Attribute2=Value2`. When referencing Salesforce objects, use the format `Atribute={!Object.Value}`. Example - `priority={!Case.Priority}, status={!Case.Status}`

8. **Save and Activate the Flow:**
   - After configuring the flow, click `Save` to store your changes.
   - Provide a name and description for the flow.
   - Click `Activate` to put the flow into operation.

By following these steps, you will create an Omni-Channel Flow that automates the routing of work items. This setup ensures interactions are effectively managed and directed to the appropriate queues and agents, enhancing operational efficiency.

Configure the Screen Pop

A screen pop is a feature that automatically displays relevant information to agents when they receive an interaction, improving efficiency and response times. To set up a screen pop in Salesforce using the `CX Cloud, External Routing` component, follow these steps:

1. **Access the App Manager:**
   - In Salesforce, go to the setup screen.
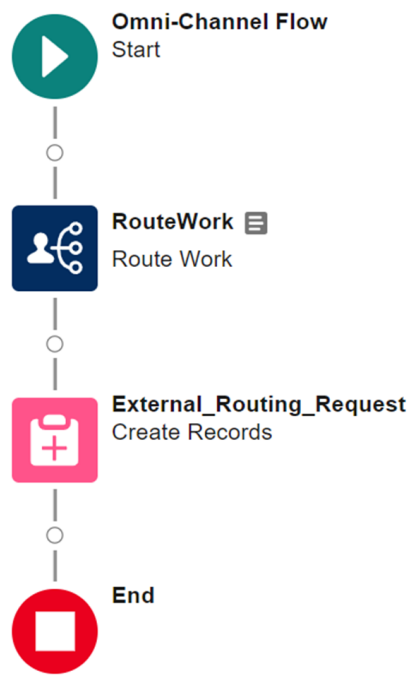
Figure 5: Omni-Channel Create Record

Figure 6: OmniChannel Flow

- Use the Quick Find box to search for `App Manager`.
- Click on `App Manager` to see the list of available apps.

2. **Select and Edit a Lightning App:**
   - From the list of apps, find the `Service Console` app (or another Lightning app of your choice).
   - Click on the `Edit` button next to the selected app to open the Lightning App Builder.
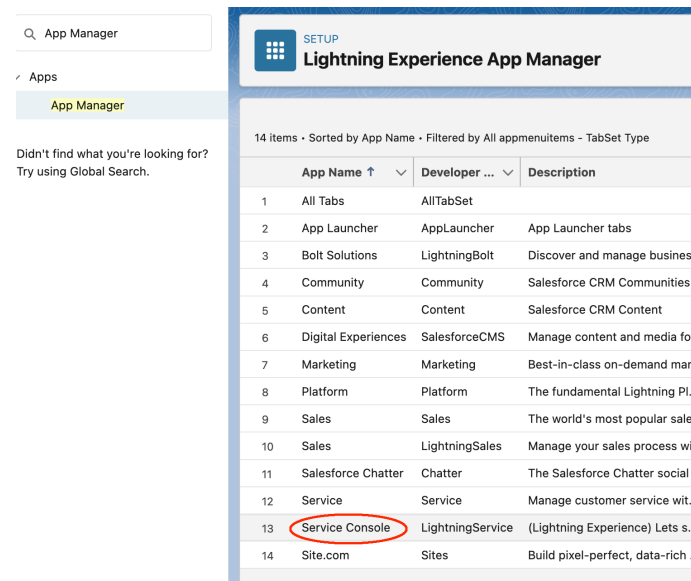
Figure 7: List Applications

3. **Configure the Utility Bar:**
   - In the Lightning App Builder, go to the `Utility Items` tab.
   - Click `Add Utility Item` to include a new component in the utility bar.

4. **Add the CX Cloud Component:**
   - From the list of available components, select `CX Cloud, External Routing`.
   - This component will be added to the utility bar at the bottom of the screen.

5. **Set Component Properties:**
   - In the properties panel, fill in the necessary details for the `CX Cloud, External Routing` component:
     - **Region**: Enter the region of your Genesys Cloud organization (e.g., `us-east-1`, `eu-west-1`).
     - **Client ID**: Provide the Client ID from your Genesys Cloud OAuth Implicit Grant setup.

6. **Enable Automatic Start:**

Figure 8: Add Utility Item

- Ensure that the `Start Automatically` checkbox is checked. This setting makes the component start automatically when the app is launched.

7. **Save and Finish:**
   - After configuring the component properties, click `Save` in the Lightning App Builder.
   - Click `Back` to return to the App Manager and complete the configuration.

By following these steps, you will add the `CX Cloud, External Routing` component to your Salesforce app. This setup will enable screen pops, providing agents with immediate access to critical information when they receive interactions, thereby enhancing their efficiency and customer service capabilities.

Ready for Testing

After completing the configuration steps for setting up the Genesys integration, Omni-Channel flow, and screen pop, your Salesforce environment is ready for testing

Setting Up Digital Experience with Messaging in Salesforce

Digital Experience in Salesforce allows you to create a seamless customer interaction platform through various channels, including in-app and web messaging. Follow these steps to enable Digital Experience and set up messaging channels for customer engagement.

1. Enable Digital Experience

1. **Navigate to Digital Experience Settings:**
   - Go to **Setup**.
   - In the **Quick Find** box, type **Digital Experience**.
   - Select **Settings** under **Digital Experience**.
2. **Enable Digital Experience:**
   - Click **Enable Digital Experience**.
   - Confirm the action if prompted.

2. Add a Messaging Channel

1. **Access Messaging Settings:**
   - Go to **Setup**.
   - In the **Quick Find** box, type **Messaging Settings**.
   - Select **Messaging Settings**.
2. **Create a New Messaging Channel:**
   - Click **New Channel**.
   - Choose **Messaging for In-App and Web**.
3. **Configure the Channel:**
   - Provide a **Channel Name**.
   - Click **Save**.

3. Set Up Embedded Service Deployment

1. **Navigate to Embedded Service Deployment:**
   - Go to **Setup**.
   - In the **Quick Find** box, type **Embedded Service Deployment**.
   - Select **Embedded Service Deployment**.
2. **Create a New Deployment:**
   - Click **New Deployment**.
   - Select **Messaging for In-App and Web**.
   - Choose **Web** for the deployment type.
3. **Configure the Deployment:**
   - Provide an **Embedded Service Deployment Name**.
   - Set the **Domain** as `*.sites.com`.
   - Select the **Messaging Channel** you created in the previous step.
4. **Publish the Deployment:**

- Once all the details are filled in, complete the setup process.
- Publish the deployment to make it live.

4. Test Messaging

1. **Enable Test Messaging:**
   - After completing the deployment, the **Test Messaging** option will become active.
   - Click on the **Test Messaging** tile.
2. **Verify the Chat Interface:**
   - A new web page will open.
   - Look for the chat icon popup on the page, which indicates that the messaging channel is functioning correctly.

Reference Links

- Salesforce In-App Messaging Overview

- Salesforce Messaging Setup Stages

Setting Up Email-to-Case in Salesforce

Email-to-Case is a powerful Salesforce feature that automates the creation of cases from customer emails. This helps streamline your support processes and ensures timely responses to customer inquiries. Follow these steps to set up and configure Email-to-Case:

1. Enable Email-to-Case

1. **Navigate to Email-to-Case:**
   - Go to Setup.
   - Enter **Email-to-Case** in the Quick Find box.
   - Select **Email-to-Case**.
2. **Enable Email-to-Case:**
   - Click **Edit**.
   - Check **Enable Email-to-Case**.
   - Click **Save**.
3. **Enable On-Demand Service:**
   - Check **Enable On-Demand Service**.
   - Click **Save**.
   - This setting allows Salesforce to handle incoming emails for case creation.

2. Configure Email-to-Case

To tailor how Salesforce processes and creates cases from emails, configure your Email-to-Case settings:

- Refer to Salesforce Email-to-Case Configuration Guide for detailed instructions.

3. Add Routing Addresses for Email-to-Case

Setting up routing addresses allows Salesforce to process emails sent to specified support addresses and create cases. Follow these steps:

1. **Set Up Routing Addresses:**
   - Define and configure the email addresses where customers send their inquiries.
   - Salesforce will monitor these addresses and create cases when an email is detected in the To, CC, or BCC fields.
2. **Refer to the Guide:**
   - For detailed steps, consult the Salesforce Routing Address Configuration Guide.

Assign an Omni-Channel Flow to Route Cases

Using Omni-Channel flow for routing cases from Email-to-Case is recommended for efficient case management. This method provides flexibility and avoids conflicts with other case assignment rules.

1. **Set Permissions:**
   - Ensure the automated case user has **Run Flows** or **Manage Flows** permission.
   - This user can be defined in Setup under **Support Settings**.
2. **Create or Edit Routing Addresses:**
   - Go to Setup.
   - Enter **Email-to-Case** in the Quick Find box and select it.
   - Create or edit the routing addresses used for customer inquiries.
   - Ensure these addresses are verified to be used for Omni-Channel flow routing.
3. **Configure Omni-Channel Flow:**
   - Specify the flow designed to handle case routing.
   - Set a fallback queue to ensure cases are assigned even if an exception occurs.
   - The fallback queue should use **Case** as the service channel and have an Omni-Channel routing setup.
4. **Save Settings:**
   - Click **Save** to finalize your configuration.

How Email-to-Case Works with Omni-Channel Flow

When a customer sends an email to your specified support address: - **Email-to-Case** automatically creates a case if none exists. - The Omni-Channel flow is executed to route the case to the appropriate queue or agent. - If the flow encounters an error, the case is routed to the defined fallback queue.

Reference Links

- Setting Up Email-to-Case in Salesforce
- Customizing Email-to-Case Settings

Transfer Chats

Reference Link

- Transfer a Chat Overview