CX Cloud, Digital and AI for Salesforce Service Cloud

Genesys Innovations

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CX Cloud, Digital and AI for Salesforce Service Cloud Installation

Prerequisites

Before installing the package, you need to make sure that you have the following features enabled in your Salesforce org:

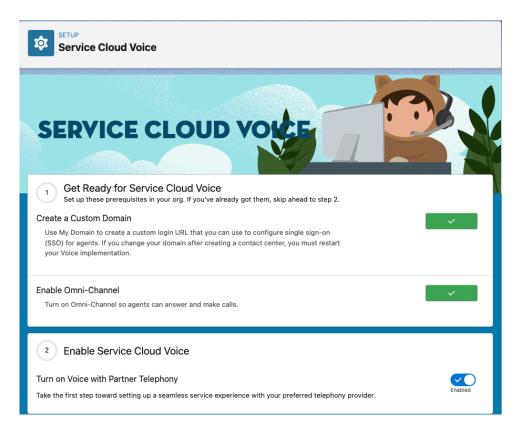
- Omni-Channel
- Service Cloud Voice

The Genesys AppFoundry CX Cloud from Genesys and Salesforce must also be installed. This package is also available on the Salesforce AppExchange.

On the setup screen of your Salesforce org, search for Omni-Channel Settings , and make sure that the Enable Omni-Channel checkbox is checked:

Omni-Channel Settings	
Omni-Channel Settings	
Omni-Channel routes work items to your support agents. It sets agent capacity for accepting work and agent availability.	
To access the latest Omni-Channel features, turn on enhanced routing. You can turn it on and off, but some advanced features are available only with enhanced routing. If you have standard messaging channels or any version of Chat, or use standard bots, you can't use enhanced routing and must turn it off. Learn About Enhanced Routing in Salesforce Help	Enhanced Omni- Channel Routing Off
	Required Information
Enable Omni-Channel 🛛 🔽	
Enable Skills-Based and ◎ Direct-to-Agent Routing	
Enable Secondary Routing Priority	
Enable Status-Based 🛛 🗌 Capacity Model	
Display a login Display a console with Omni- Channel	

Search for Partner Telephony Setup , and make sure that the Turn on Voice with Partner Telephony checkbox is checked:



Do not turn on "Enhanced Omni-Channel Routing".

Install the package

Open the lightning application Admnistration Settings (you can find it in the App Launcher) that was installed during this process and open the tab Install and Update Packages :

• 	ti	Core Services	~		11~ 11			ile II:
X Cloud from Genesys	. 🗹	Core Services						
Logging		Install and Update Pack	ages	◀				
* Log Level	💉 E	dit						
ERROR								
 Enable Server-Side Loggi 	ing							
Enabling this option allows t These logs can contain pote selecting this option, you ac purposes.	ntially se	nsitive information such a	as, uniq	ue identifi	ers, package	settings, and	other technic	al data. By

In the list of available packages, open the CX Cloud, Digital and AI for Salesforce Service Cloud package, and click on the Install now button:

POST INSTALL STEPS

-		Q Search	* =	@? \$ 🖡 🐻
Administration Setti	Install and Update Packa 🗸			
CX Cloud from Genesys and Sa	alesforce Package Listings	11177-111777 ANNUS ANNO ANNO ANNO ANNO ANNO ANNO ANNO ANN		CANNIN IIIIIC
> CX Cloud from Genesys and	Salesforce Current			Expand All
> CX Cloud, Voice for Salesford	ce Service Cloud			
✓ CX Cloud, Digital and AI for S	Salesforce Service Cloud			
Enable digital channels from Ge	enesys Cloud within Salesforce Service Cl	oud and integrate Einstein's Next Best Action along with transcription	features.	ل Install Now
Not Installed Latest Release	se 1.5.0			
> CX Cloud, WEM for Salesford	ce Service Cloud			

Post Install steps

Note: This is a work in progress. The following steps are not yet automated. The goal is to automate them in the future.

Create the Service Channels

Create two Service Channels:

- One for the Genesys Cloud Chat Messaging, called Genesys Cloud Messaging and related to genesysps__Experience__c ,
- One for the Genesys Cloud Email Messaging, called Genesys Cloud Email and related to genesysps__EmailExperience__c .

On the Setup screen, search for Service Channels, click on New, and fill in the form:

Service Channels					
Route work from a Salesforce object, such as cases, chats, leads, or even custom objects, to support agents.					
Save Cancel					
Basic Information					
Service Channel Name Genesys Cloud Messagi					
Developer Name Genesys_Cloud_Messa					
Salesforce Object Experience					
Custom Console Footer O Component					
Minimize the Omni-Channel ◎					
Automatically accept work					
Audio Settings					
Override agents' audio settings 🛛 🗌					
Save Cancel					

Service Channels

Route work from a Salesforce object, such as cases, chats, leads, or even custom objects, to support agents.

	Save
Basic Information	
Service Channel Name	Genesys Cloud Email
Developer Name	Genesys_Cloud_Email
Salesforce Object	Email Experience ~
Custom Console Footer Component	
Minimize the Omni-Channel widget when work is accepted	
Automatically accept work requests Ø	
Is Interruptible 😣	
Audio Settings	
Override agents' audio settings	
	Save

You can choose Automatically accept work requests if you want to have your agents answering chat conversations automatically. This will configure all agents that use this Service Channel. See the Presence Configuration section below for a more granular configuration.

Assign Field-Level Security

On the setup screen, search for Profiles and click on Profiles . Click on the profile the agents will use (do not click on the 'Edit' link).

	Profiles				
Profiles	Profiles				
All Profiles ~	Edit I Delete I Create New View				
New Profile					
Action	 Profile Name ↑	User License			
Edit Clone	Salesforce API Only System Integrations	Salesforce Integration			
Edit Clone	Silver Partner User	Silver Partner			
Edit Clone	Solution Manager	Salesforce			
Edit Clone	Standard Platform User	Salesforce Platform			
Edit Clone	Standard User	Salesforce			
Edit Clone	System Administrator	Salesforce			

Scroll down to the Field-Level Security and Custom Field-Level Security , click on the View link of the Experience object. Click on the Edit button and set the accesses as shown here:

POST INSTALL STEPS

	Edit Back to Profile	J		
Field Name		Field Type	Read Access	Edit Access
Account		Lookup	✓	1
Agent Id		Text	✓	
Authenticated		Checkbox	✓	
Case		Lookup	\checkmark	1
Completed		Checkbox	✓	1
Contact		Lookup	✓	1
Created By		Lookup	\checkmark	
Customer Id		Text	✓	
Detail Analytics		URL	✓	
Ended		Date/Time	\checkmark	
Experience Name		Auto Number	✓	
Genesys Cloud Interaction Transcript		Lookup	✓	
ntent		Text	\checkmark	
nteraction Id		Text	✓	\checkmark
ast Modified By		Lookup	\checkmark	
.ast utterance		Text	\checkmark	
Media Type		Picklist	✓	
Vext Experience		Lookup	\checkmark	
Dwner		Lookup	\checkmark	✓
Previous Experience		Lookup	✓	
Queue Id		Text	✓	
Queue Name		Text	\checkmark	
Related Object		Picklist	✓	
Started		Date/Time	✓	
Wrapped		Date/Time	\checkmark	
Vrap-up Code Id		Text	✓	
Vrap-up Code Name		Text	\checkmark	
Vrap-up Code Notes		Text Area	\checkmark	
Wrap-up Code Timeout		Number	✓	
Wrap-up Code Type		Text	✓	

Do the same thing with the $\mbox{ GCX Chat Transcript}$:

	Edit Back to Profile		
Field Name	Field Type	Read Access	Edit Access
Body	Long Text Area	✓	
Chat Transcript Name	Text	<	<
Created By	Lookup	<	
Last Modified By	Lookup	✓	
Owner	Lookup	\checkmark	\checkmark

Similarly, do the same thing with the Email Experience object:

	Edit Back to Profile		
Field Name	Field Type	Read Access	Edit Access
Account	Lookup	\checkmark	
Agent Id	Text	\checkmark	
Case	Lookup	\checkmark	
Completed	Checkbox	\checkmark	1
Contact	Lookup	\checkmark	
Created By	Lookup	\checkmark	
Customer Id	Text	\checkmark	
Ended	Date/Time	\checkmark	
Experience Name	Auto Number	\checkmark	
Forwarded	Date/Time	\checkmark	
From	Text	\checkmark	
From Address	Text	\checkmark	
Interaction Id	Text	\checkmark	\checkmark
Last Modified By	Lookup	\checkmark	
Next Email Experience	Lookup	\checkmark	
Owner	Lookup	\checkmark	\checkmark
Previous Experience	Lookup	\checkmark	
Queue Id	Text	\checkmark	
Queue Name	Text	\checkmark	
Related Object	Picklist	\checkmark	
Responded	Date/Time	\checkmark	
Started	Date/Time	\checkmark	
Subject	Text	\checkmark	
To Address	Text	\checkmark	\checkmark
Wrapped	Date/Time	\checkmark	
Wrap-up Code Id	Text	\checkmark	
Wrap-up Code Name	Text	\checkmark	
Wrap-up Code Notes	Text Area	\checkmark	
Wrap-up Code Timeout	Number	\checkmark	
Wrap-up Code Type	Text	✓	

Email Experience Message object:

	Edit Back to Profile		
Field Name	Field Type	Read Access	Edit Access
BCC Address	Text	\checkmark	✓
CC Address	Text	\checkmark	✓
Created By	Lookup	\checkmark	
EmailMessageId	Text	\checkmark	1
From Address	Email	\checkmark	1
From Name	Text	\checkmark	
HTML Body	Long Text Area	\checkmark	
Is Incoming	Checkbox	\checkmark	
Last Modified By	Lookup	\checkmark	
Message Date	Date/Time	\checkmark	
Message Identifier	Text	\checkmark	
Name	Text	\checkmark	✓
Owner	Lookup	\checkmark	1
RelatedTold	Lookup	\checkmark	
Subject	Text	\checkmark	
Text Body	Long Text Area	\checkmark	
To Address	Text	1	1

POST INSTALL STEPS

	Edit Back to Profile		
Field Name	Field Type	Read Access	Edit Access
AttachmentId	Text	\checkmark	
AttachmentName	Text	\checkmark	
Content Length	Number	\checkmark	
Content Type	Text	\checkmark	
Content URI	Text	\checkmark	
Content Version Id	Text	\checkmark	
Created By	Lookup	\checkmark	
Is Inline	Checkbox	\checkmark	
Is Uploaded	Checkbox	\checkmark	
Last Modified By	Lookup	\checkmark	
Name	Text	\checkmark	✓
Owner	Lookup	\checkmark	✓
RelatedTold	Lookup	\checkmark	

Create the Service Presence Statuses

Note: In this section, if you use Genesys Cloud for Service Cloud Voice, you don't need to create new Service Presence Statuses, you just need to add the newly created Service Channel to the existing available statuses you want your agents to use when they process Genesys Cloud Chats.

Create, at least, the following Service Presence Statuses connected to the Genesys Cloud Messaging Service Channel you created in the previous step:

- Available
- Available on Queue
- Busy

On the Setup screen, search for Presence Statuses , click on New , and fill in the form:

Let agents indicate when t	hey're online and available to red	·	fic service channel, or whether they're away or offline.
Basic Information			= Required Information
Status Name Developer Name	Available on Queue Available_on_Queue		
	ents are online or busy when the ppear away and indicate that the		ses let agents receive new work items. Busy statuses rk items.
👻 Service Channe	Is		
Select one or more s channels you select		presence status. Agents logo	ged into this presence status can receive work from the
Available C	Add Gen	Selected Channels esys Cloud Email esys Cloud Messaging saging ne	

Presence Statuses
Let agents indicate when they're online and available to receive work items from a s
Save
Basic Information
Status Name Busy Developer Name Busy
Choose whether agents are online or busy when they use this status. Online indicate that they're unavailable to receive work items. Online Busy
Save

And finally the Available status:

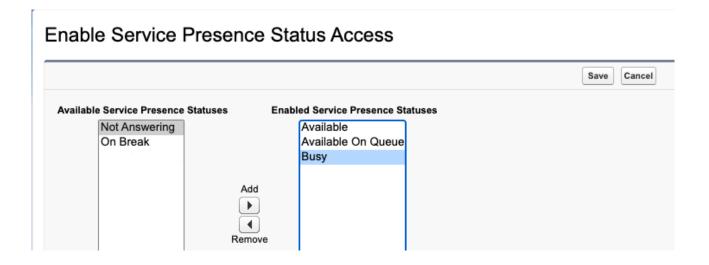
Presence Statuses				
Let agents indicate when they're online and available to receive work items from a specific service channel, or whether they're away or offline.				
Save				
Basic Information = Required Information				
Status Name Available				
Developer Name Available				
- Status Options				
Choose whether agents are online or busy when they use this status. Online statuses let agents receive new work items. Busy statuses make your agents appear away and indicate that they're unavailable to receive work items. Online Busy				
▼ Service Channels				
Select one or more service channels to assign to this presence status. Agents logged into this presence status can receive work from the channels you select.				
Available Channels Selected Channels				
Add Add Remove Add Genesys Cloud Email Genesys Cloud Messaging Phone				

Assign the Presence Statuses to User Profiles

On the setup screen, search for Profiles and click on Profiles . Click on the profile the agents will use (do not click on the 'Edit' link).

	files	
Profiles		
All Profiles ~	Edit I Delete I Create New View	
New Profile	0	
Action	Profile Name ↑	User License
Action Edit Clone		User License Salesforce Integration
0	Salesforce API Only System Integrations	
Edit Clone	Salesforce API Only System Integrations Silver Partner User	Salesforce Integration
Edit Clone	Salesforce API Only System Integrations Silver Partner User Solution Manager	Salesforce Integration Silver Partner
Edit Clone Edit Clone Edit Clone	Salesforce API Only System Integrations Silver Partner User Solution Manager Standard Platform User	Salesforce Integration Silver Partner Salesforce

Click on the Enabled Service Presence Status Access[0] link, and then on the Edit button, and add all the statuses you created in the previous step:



Create the Presence User Configuration

Create a Presence User Configuration for agents that will be handling Genesys Cloud chats, emails. You should set the capacity of your agents. For example, if you have 10 agents, and each agent can handle 5 chats at the same time, then you should set the Capacity to 50.

On the Setup screen, search for Presence Configurations , click on New , and fill in the form:

	Save	
Basic Information	= Required In	nformation
Presence Configuration Name	Experience Agents	
Developer Name	Experience_Agents	
Capacity 😡	20	
Interruptible Capacity 😡		
Automatically accept work requests		
Allow agents to decline work requests		
Update Status on Decline		
Allow agents to choose a decline reason		
Update Status on Push i Timeout		
Audio Settings		
Play a notification sound for work requests		
Notification Sound	Default	
	Custom sound	
Sound Length (Seconds) 😡		
	Maximum: 30	
Play a notification sound if Omni Channel loses connection		
After Conversation Wo	rk Time	
Give agents wrap-up lo time after conversations		

Assign the new Presence Configuration to agents and/or user profiles.

Notes:

- If you want to have your agents answering conversations automatically, you should configure the Presence Configuration in Salesforce and not set the queue to auto-answer in Genesys Cloud. Only agents that are mentioned in this conversation or member of the profile that is mentioned in the Presence Configuration will be able to automaticall answer.
- You can also use difference configurations for Chat, Voice and Email, etc. Some configurations would allow auto-answer for chats, but not for emails, for example. They could also use different alerts, capacities, etc.

Create a Routing Configuration

On the setup screen, search for Routing Configurations , and click on the New button.

Routing Configurations
The routing priority determines the order in which work items are pushed to agents. Higher priority work The routing model determines how to distribute work items to your agents. It acts as a tiebreaker if two between work item capacity and open work items.
Basic Information Routing Configuration Name Experiences
Developer Name Experiences Overflow Assignee If you don't give the overflow as User
Routing Settings
The routing priority determines the order in which work items across your Omni-Channel queues get The routing model determines how to evenly distribute work items to your agents. It acts as a tiebrea
Routing Priority I Routing Model I External Routing V Push Time-Out (seconds) I
Work Item Size
Specify the size of the work items in the <u>queues</u> associated with this configuration. You can size item
Percentage of Capacity

Create the flows

Create Backup Queues for the flows

On the setup screen, search for Queues , and click on the New button.

Create a Queue called Experiences that will deal with the Experience object and add the users/groups you desire as queue members. Also attach the Routing Configuration previously created.

Queue Edit	
Queue Name and Email Address	
Enter the name of the queue and the email address to use wh	en sending notifications (for example
Label	Experiences
Queue Name	Experiences
Queue Email	
Send Email to Members	
Configuration with Omni-Channel Routing	
If your organization uses Omni-Channel, you can link queues Routing Configuration	to a routing configuration. This will pu Experiences
Supported Objects	
Select the objects you want to assign to this queue. Individual Available Objects Agent Work Alternative Payment Method	Selected Objects
Appointment Bundle Config Appointment Bundle Policy Attribute Definition Attribute Picklist Authorization Form Authorization Form Consent Authorization Form Data Use Business Brand Case Change Request GCX Chat Transcript Communication Subscription	e
Queue Members	
To add members to this queue, select a type of member, then those objects.	choose the group, role, or user from
Search: Users v for:	Find
Available Members Selected Members	
User: Integration User User: Security User	

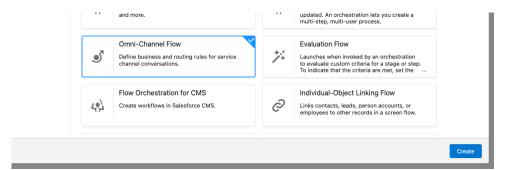
Create another queue called Email Experiences that will deal with the Email Experience object and add the users/groups you desire as queue members. Also attach the Routing Configuration previously created.

Create the Flow to route an Experience

On the setup screen, search for Flows and click on New Flow . Select All + Templates , Omni-Channel Flow and click on Create :

POST INSTALL STEPS

:



Adddanew Resource of type Variable called input_record of type genesysps__Experience__c

	New Resource
* Resource Type	
Variable	▼
* API Name	
input_record	
Description	
* Data Type	Allow multiple values (collection)
Record	
* Object Experience	
Availability Outside the Flow	
 Available for input 	
Available for output	
	Cancel Done

Note: Make sure to check the Available for input checkbox.

Addanew Resource of type Variable called recordId if type Text :

New F	Resource
• Resource Type	
Variable	•
* API Name	
recordId	
Description	
• Data Type	
Text	Allow multiple values (collection)
Default Value	
Enter value or search resources	Q
Availability Outside the Flow Image: Available for input Available for output	
	Cancel Done

Note: Make sure to check the Available for input checkbox.

X

Q

Add a Route Work step called Route Experience to Queue after the Start step. Configure that step as follows:

≗ €	Edit Route Work	
	Route Experience to Queue (Route_Experience_to_Queue)	

Single	
Multiple	
* Record ID Variable	
{!input_record.ld}	
* Service Channel	
Genesys Cloud Messaging	×
* Route To	
Queue	•

The flow should look like this:

Use Variable
 * Queue ID

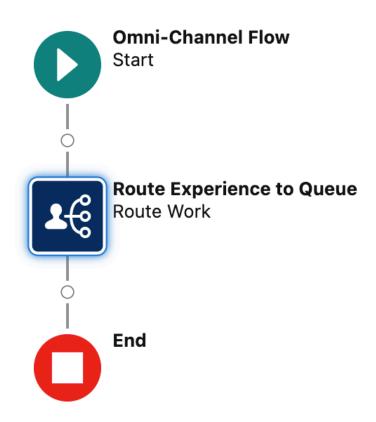
۲

MessagingExperiences

Set Additional Input Values

Search resources...

Screen Pop Collection Variable



Save it as Route Messaging Experience to Queue and activate the flow.

Create the Flow to start Omni-Channel Routing upon creating an Experience

On the setup screen, search for Flows and click on New Flow . Select Record-Triggered Flow and click on Create . Then, search for Experience as the triggering object. The Entry Conditions should be set to All Conditions are Met (AND) the condition set as follows:

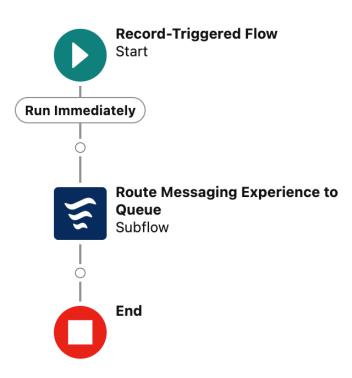
Select Object			
elect the object whose records trigger the flow when they're created, upd	ated, or deleted.		
Object			
Experience			
Configure Trigger			
Trigger the Flow When:			
A record is created			
A record is updated			
A record is created or updated			
A record is deleted			
Set Entry Conditions			
pecify entry conditions to reduce the number of records that trigger the fl	ow and the number of times the flow is e	ecuted. Minimizing unnecessary	
ow executions helps to conserve your org's resources.			
you create a flow that's triggered when a record is updated, we recomme	nd first defining entry conditions. Then a	plact the Only when a record in	
pdated to meet the condition requirements option for When to Run the		elect the only when a record is	
condition Requirements			
All Conditions Are Met (AND)			
Field	Operator	Value	

Add a Subflow step after the Start step:

Record-Triggered Flow Start Run Immediately
Add Element
Shortcuts
Dpdate Triggering Record
Dpdate Related Records
Send Email Alert
Interaction
4 Action
Subflow
End

And configure the subflow as follows:

F	dit Subflow Route Messaging Experience to Queue (<i>Route</i> o_ <i>Queue)</i>	_Messaging_Experience
flow. B of the	alues from the parent flow to set the inputs for the "Ro y default, the parent flow stores all outputs. You can e Subflow element or manually assign variables in the pa oute Messaging Experience to Queue" flow.	ither reference outputs via the API name
Refer	enced Flow	
ž	Route Messaging Experience to Queue	Open Referenced Flow
Set Ir	put Values	
Ē	input_record	
	{!\$Record}	include
A _a	recordId (!\$Record.Id}	Include



Save it as Start Omni-Channel for new Messaging Experience and activate the flow.

Create the Flow to pop an Email Experience to an agent

On the setup screen, search for Flows and click on New Flow . Select All + Templates , Omni-Channel Flow and click on Create :

	and more.		updated. An orchestration lets you create a multi-step, multi-user process.	
٩	Omni-Channel Flow Define business and routing rules for service channel conversations.	**	Evaluation Flow Launches when invoked by an orchestration to evaluate custom criteria for a stage or step. To indicate that the criteria are met, set the	
4 <u>0)</u>	Flow Orchestration for CMS Create workflows in Salesforce CMS.	Q	Individual-Object Linking Flow Links contacts, leads, person accounts, or employees to other records in a screen flow.	
				Create

Adddanew Resource of type Variable called input_record of type genesysps__EmailExperience__c

	New Resource	
* Resource Type		
Variable		•
* API Name		
input_record		
Description		
		_/;
* Data Type		
Record	Allow multiple values (collection) 1	
* Object		
Email Experience		
Availability Outside the Flow		
Available for input		
Available for output		
	Cancel	e

Note: Make sure to check the Available for input checkbox.

Addanew Resource of type Variable called recordId if type Text :

	New Resource	
* Resource Type		
Variable		•
* API Name		
recordId		
Description		
* Data Type Text	Allow multiple values (collection)	le
Default Value		
Enter value or search resources		Q
Availability Outside the Flow ✓ Available for input Available for output		
	Cancel	Done

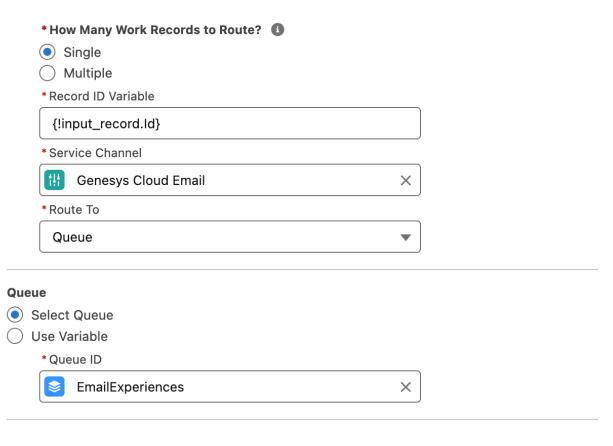
Note: Make sure to check the Available for input checkbox.

Add a Route Work step called Route to Agent after the Start step. Configure that step as follows:

🔏 Edit Route Work

Route Experience to Queue (Route_Experience_to_Queue)

Set Input Values



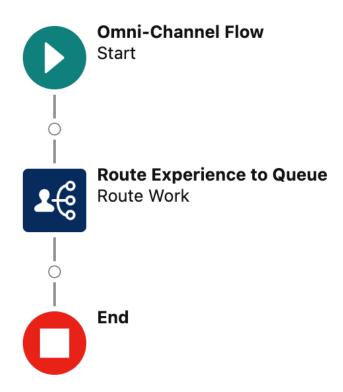
Q

Set Additional Input Values

Screen Pop Collection Variable

Search resources...

×

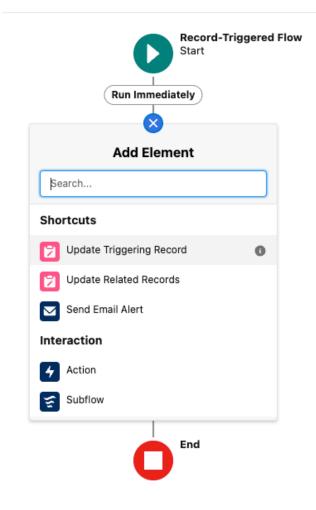


Save it as Route Email Experience to Agent and activate the flow.

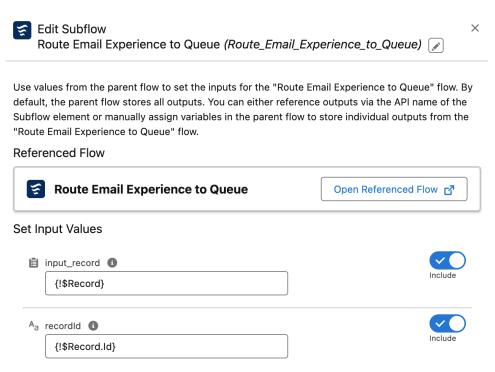
Create the Flow to route the Email Experience to an agent

On the setup screen, search for Flows and click on New Flow . Select Record-Triggered Flow and click on Create . Then, search for Email Experience as the triggering object. The Entry Conditions should be set to All Conditions are Met (AND) the condition set as follows:

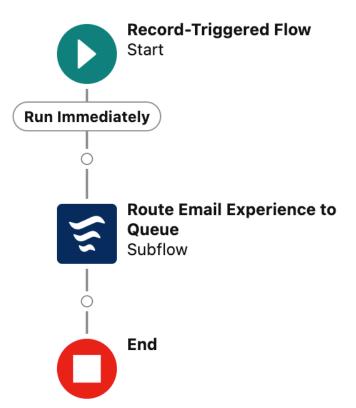
Select Object	
Select the object whose records trigger the flow updated, or deleted.	when they're created,
* Object	
Email Experience	
Configure Trigger	
Trigger the Flow When:	
A record is created	
A record is updated	
A record is created or updated	
A record is deleted	
Set Entry Conditions	
Specify entry conditions to reduce the number of executed. Minimizing unnecessary flow execution f you create a flow that's triggered when a record he Only when a record is updated to meet the Records.	of records that trigger the flow and the number of times the flow is ns helps to conserve your org's resources. rd is updated, we recommend first defining entry conditions. Then select e condition requirements option for When to Run the Flow for Updated
specify entry conditions to reduce the number of xecuted. Minimizing unnecessary flow execution f you create a flow that's triggered when a record he Only when a record is updated to meet the tecords.	ns helps to conserve your org's resources. rd is updated, we recommend first defining entry conditions. Then select
pecify entry conditions to reduce the number of xecuted. Minimizing unnecessary flow execution you create a flow that's triggered when a record he Only when a record is updated to meet the lecords.	ns helps to conserve your org's resources. rd is updated, we recommend first defining entry conditions. Then select
Specify entry conditions to reduce the number of executed. Minimizing unnecessary flow execution f you create a flow that's triggered when a record he Only when a record is updated to meet the Records. Condition Requirements	ns helps to conserve your org's resources. rd is updated, we recommend first defining entry conditions. Then select a condition requirements option for When to Run the Flow for Updated



And configure the subflow as follows:



The flow should look like this:



Save it as Start Omni-Channel for new Email Experience and activate the flow.

Create a new Record Page for the Experience

On the setup screen, search for Lightning App Builder and click on New to create a new Record Page for the Experience object called "Experience Record Page". And add the various Components you desire.

For an optimal experience, we recommend the following components:

- Genesys Cloud Chat This component shows the active chat conversation as well as the transcript once the chat has been disconnected.
- Genesys Cloud Chat Controls This component is used to control the active chat (disconnect, transfer, etc.)
- Genesys Cloud Einstein Assist
 This component transmits the chat text to Einstein's Next Best Action. It can be added to the Experience
 Record Page or to the Utility Bar (not both).

3 more components are available:

- Genesys Cloud Chat Bar Utility This component is used in the Utility Bar (where Omni-Channel shows) and should not be added to the Record page.
- Genesys Cloud Transcript
 This component is used to see the transcript of a voice or chat conversation. It is not used on the Experience Record page, it can rather be used on a Voice Record page, for example.
- Genesys Cloud Responses
 This component is used to show the canned responses available in Genesys Cloud to the agent.
 Canned responses will be available when the agent is logged in.
 It works for both Chat and Email.

Here is an example of what the page could look like:

Experience EX-00655		New Contact New Event New Task 🔻
Contact Case Intent Hello sam1		
Related Details	INTERACTION has joined the conversation	Genesys Interaction Management
✓ Information	↑	Focus Time: 00:00:00
Experience Name	Genesys Cloud Chat Genesys Cloud Chat Controls	Filters: All time - All activities - All types
Completed		Refresh • Expand All • View All
Completed		V Upcoming & Overdue No activities to show.
Owner		Get started by sending an email, scheduling a task, and more.
		No past activity. Past meetings and tasks marked as done show up here.
Contact et	Genesys Cloud Einstein Assist	0 + â
Account		+ *
Account		Next Best Action
Case 🖉		Einstein doesn't have any recommendations for you right now.

Create a new Record Page for the Email Experience

On the setup screen, search for Lightning App Builder and click on New to create a new Record Page for the Email Experience object called "Email Experience Record Page". And add the various Components you desire.

For an optimal experience, we recommend the following components:

- Genesys Cloud Email
- This component shows the active email conversation.
- Genesys Cloud Email Controls This component is used to control the active email (disconnect, transfer, etc.)

Here is an example of what the page could look like:

Email Experience EEX-00014	9/10 <i>72 1117</i> 2, AMB (1.	New Contact Edit	New Opportunity
Contact	Subject Email Test	Case	
Experience Name EEX-00014	Owner	Genesys Interaction Management	
Interaction Id 6825e754-128b-4a4d- a536-c396c5eaf5b4		CX Interaction Time:: Agent Interaction Time::	
Created By <u>User User</u> , 1/28/2024, 7:28 PM	Last Modified By S User User, 1/28/2024, 7:28 PM		
		[Genforce] Email Test #26	$(*) (*) \rightarrow$
		 ✓ ▲1/29/2024, 12:28:39 PM, ▲100 From ▲12:28 PM 	Jan 28, 2024
		To Jiminy Cricket <	
		Hello!	

Configure a Lightning App for the Experience

Log on your Genesys Cloud console with an Administrator account and create a Token Implicit Grant :

■ Integrations / OAuth / Sa	lesforce
Integrations	Client Details
Actions	App Name
Single Sign-on	Salesforce
OAuth	Description
Authorized Applications	
	Token Duration (seconds): the number of seconds, between 5mins and 48hrs, until tokens created with this client expire.
	86400
	Grant Types
	\bigcirc Client Credentials
	○ Code Authorization
	Token Implicit Grant (Browser)
	○ SAML2 Bearer
	Authorized redirect URIs (one per line)

Notes:

- The Token Duration must be longer than the shift of your agents.
- The scopes for the OAUTH implicit grant should be:

- conversations,
- notifications,
- presence,
- response-management:readonly (if you plan to use Canned Responses),
- routing:readonly,
- upload .
- users
- · The permissions for the agents should be:
 - conversation:communication:blindTransfer,
 - conversation:message:create ,
 - conversation:message:view ,
 - conversation:participant:wrapup ,
 - conversation:webmessaging:create ,
 - conversation:webmessaging:view ,
 - directory:user:view ,
 - externalContacts:contact:view ,
 - responses:library:view , (if you plan to use Canned Responses)
 - responses:response:view , (if you plan to use Canned Responses)
 - routing:queue:search ,
- Do not forget to add your Salesforce redirect URI to the list of allowed redirect URIs in the Genesys Cloud OAUTH configuration. That URL should be something like this:

https://xxxx.lightning.force.com/lightning/page/home

where xxxx is the base name of your org. You can find that name in the URL of your Salesforce org:

;	genesys-1d7-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home						
			Q	Search Setup			
tup	<u>Home</u>	Object Manager 🗸					
				~ 1200			

In this example, the basename 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/lightning/page/home

Back on the Salesforce pages, on the setup screen, search for the
Lightning apps (you can also create your own), here we will use the
create your own Lightning app. Click on the
Edit
button:App Manager
Service Console
app, you can also
app, you can also

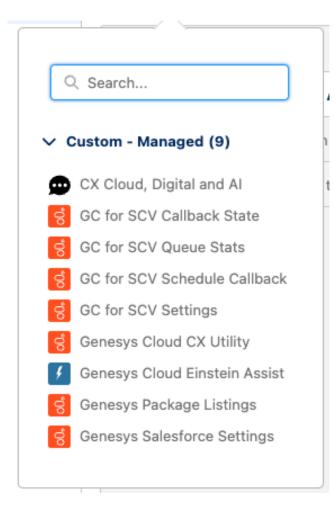
CX CLOUD, DIGITAL AND AI FOR SALESFORCE SERVICE CLOUD INSTALLATION

Q App Manager		SETUP	.		New Lightning App	New Co	onnected	Арр
Apps		Lightning Exp	perience App	Manager				
App Manager						~ ~ `) ~		
Didn't find what you're looking for?	14 iter	ms • Sorted by App Name	• Filtered by All app	menuitems - TabSet Type				¢ -
ry using Global Search.		App Name 🕇 🛛 🗸	Developer \vee	Description \lor	Last Modified $ \lor $	App \lor	Vi ~	
	1	All Tabs	AllTabSet		8/22/2023, 9:16 PM	Classic		▼
	2	App Launcher	AppLauncher	App Launcher tabs	8/22/2023, 9:16 PM	Classic	\checkmark	
	3	Bolt Solutions	LightningBolt	Discover and manage busines	8/22/2023, 9:16 PM	Lightning	\checkmark	
	4	Community	Community	Salesforce CRM Communities	8/22/2023, 9:16 PM	Classic	~	
	5	Content	Content	Salesforce CRM Content	8/22/2023, 9:16 PM	Classic	\checkmark	
	6	Digital Experiences	SalesforceCMS	Manage content and media fo	8/22/2023, 9:16 PM	Lightning	\checkmark	
	7	Marketing	Marketing	Best-in-class on-demand mar	8/22/2023, 9:16 PM	Classic	~	
	8	Platform	Platform	The fundamental Lightning Pl	8/22/2023, 9:16 PM	Classic		
	9	Sales	Sales	The world's most popular sale	8/22/2023, 9:16 PM	Classic		
	10	Sales	LightningSales	Manage your sales process wi	8/22/2023, 9:19 PM	Lightning	~	
	11	Salesforce Chatter	Chatter	The Salesforce Chatter social	8/22/2023, 9:16 PM	Classic	~	
	12	Service	Service	Manage customer service wit	8/22/2023, 9:16 PM	Classic	\checkmark	
	13	Service Console	LightningService	(Lightning Experience) Lets s	8/22/2023, 10:37 P	Lightning	~	F
	14	Site.com	Sites	Build pixel-perfect, data-rich	8/22/2023, 9:16 PM	Classic	Edit	

In the Lightning App Builder, click on the Navigation Items tab, and add the Experiences and Email Experiences to the right column (Seleted Items):

Available Items	C ¹ Create v	Selected Items
Q experiences	\otimes	Gases
Digital Experiences Home		E Contacts
Email Experiences		Counts
Experiences		Reports
		O Dashboards

In the Lightning App Builder, click on the Utility Items tab, and add the CX Cloud, Digital and AI component:



Fill in the Component Properties with the region of your Genesys Cloud Organization and the client ID of your Genesys Cloud OAuth Implicit Grant. Also pick what Salesforce Presence Status should be used for Available and Available on Queue:

	PROPERTIES CX Cloud, Digital and Al
CX Cloud, Digital and Al	
History	✓ Utility Item Properties
Notes	* Label
	CX Cloud, Digital and Al
	Icon
	✓ fallback ×
	Panel Width
	340
	Panel Height
	480
	Start automatically
	No C
	No C * Genesys Cloud Region C Americas (US West) C
	* Genesys Cloud Region
	Genesys Cloud Region Americas (US West)
	Genesys Cloud Region Americas (US West) Genesys Cloud Implicit Grant Client Id
	Genesys Cloud Region Americas (US West) Genesys Cloud Implicit Grant Client Id Available Presence Status
	Genesys Cloud Region Americas (US West) Genesys Cloud Implicit Grant Client Id Available Presence Status Available C
	Genesys Cloud Region Americas (US West) Genesys Cloud Implicit Grant Client Id Available Presence Status Available Available On Queue Presence Status
	Genesys Cloud Region Americas (US West) Genesys Cloud Implicit Grant Client Id Available Presence Status Available Available On Queue Presence Status Available On Queue C
	Genesys Cloud Region Americas (US West) Genesys Cloud Implicit Grant Client Id Available Presence Status Available Available On Queue Presence Status Available On Queue Co Tab name format

You can also change the label to your liking.

Notes:

- Do not forget to check the Start Automatically box.
- If you have installed and will use CX Cloud, Voice for Salesforce Cloud Voice, select Yes to the question: "Is CX Cloud, Voice for Salesforce Cloud Voice installed?". You can choose any status in the latter fields, they will not be used by CX Cloud, Digital and AI for Salesforce Cloud Voice. You can also install it and not use it for specific lightning apps.
- The 'Tab name format' will be used to name the tabs containing Experiences. Firstname and Lastname come from the Participant Data associated with the Experience.
- You can also opt out of creating/linking incoming Experiences to Salesforce Contacts by selecting 'No' for 'Should Contacts be created or linked on incoming Experiences?'.

If you didn't add Geneys Cloud Einstein Assist on your Experience Record Page, you should add it here in the Utility Items (remember, don't add it in both places):

App Settings		Utility Items (Desktop O
App Details & Branding		Give your users quick access to p
App Options		
Utility Items (Desktop Only)		Add Utility Item
Navigation Items		
Navigation Rules	Q	Search
User Profiles		/isualforce
		stom (0) Iponents available.
	∨ Cu	stom - Managed (4)
	D 0	X Cloud, Digital and Al
	4 0	Genesys Cloud Einstein Assist
	4 0	Genesys Cloud for Salesforce Pa
	f 0	Genesys Cloud for Salesforce Se

Page > Genesys Cloud Einstein As	
Trained Modelld (1)	
Email ID 🚯	
Private Key Private Key Priva	QIBAE
Contact Center Name	
vttesting	Q
Use Last Utterance for NBA?	0
No	Q

Component Properties:

- Trained Model ID (deprecated): Specifies the trained model for Einstein Assistant's Knowledge Articles. May not be needed for other GCEA features, such as Real-Time Voice Transcription and NBA strategy activation. If a value is obligatory, placeholder text is acceptable.
- Email ID (deprecated): Associates an email with your Einstein Assistant for Knowledge Articles. It's not always needed for other features; a placeholder may be used if necessary.
- Private Key : Provides a secure means of authenticating and ensuring data integrity between Salesforce and Genesys. The RSA private key, usually shared with Genesys for SCV setup, should be pasted here. It's a lengthy alphanumeric code that typically starts with "--BEGIN RSA PRIVATE KEY--" and ends with a corresponding "--END RSA PRIVATE KEY--" tag.
- Contact Center Name : Designates which contact center within Genesys the Salesforce integration should point to. Select the interaction name from the dropdown.
- Use Last Utterance for NBA? : When the option "Yes" is selected for Next Best Action, the last customer utterance will be utilized. Conversely, if the option is not selected, the last utterance will not be used.

Einstein Next Best Action Integration in Salesforce

Key Components:

- Strategy Development for Recommendations: Crafting an effective strategy is crucial to tailor recommendations that align with business goals and customer needs. This involves analyzing customer data and behaviors to generate personalized and contextually relevant suggestions.
- Implementation of Suggested Actions: After developing a strategy, the next step is to implement actionable suggestions. These actions are designed to enhance customer engagement and decision-making processes, leveraging the predictive power of Einstein to deliver optimal recommendations at the right moment.

Create Recommendations

Recommendations in Salesforce are treated as standard records, much like accounts and contacts. These recommendation records are processed by strategies and linked to flows. The role of strategies is to decide which recommendation records should be surfaced. This is achieved through the use of business rules, predictive models, and various data sources. The outcome of this process yields recommendations tailored to specific contexts, enabling you to present them to users.

Follow the steps to Create Recommendations.

Create a Recommendation Strategy for Einstein's Next Best Action

On the setup screen, search for Process Automation . Click on Next Best Action and create a new strategy. For Voice and Messaging, two different strategies should be created.

Using Flow Builder

- Go to Setup and use the Quick Find box to search for "Flows". Select 'Flows' and then click 'New Flow'.
- In the 'Templates' tab, choose 'Recommendation Strategy' as the flow type and click 'Create'.
- To load the desired records for your recommendation, add a 'Get Records' element to the flow. Set a label and an API name.

Edit Get Records Get Experience (Get_Experience) 🖉	>
Get Records of This Object	
*Object	
Experience	
Filter Experience Records	
Condition Requirements	
All Conditions Are Met (AND)	
Field Operator Value	
Id Equals V Aa recordid X	a
+ Add Condition	
Sort Experience Records	
Sort Order	
Not Sorted If you store only the first record, filter by a unique field, such as ID.	
How Many Records to Store	
Only the first record	
○ All records	
How to Store Record Data	
Automatically store all fields	
O Choose fields and let Salesforce do the rest	
 Choose fields and assign variables (advanced) 	

- Choose the Experience object.
- In the 'Filter' section, define conditions to filter the records from your chosen object for the strategy.
- Add another 'Get Records' element to bring a specific recommendation into your strategy. Again, set a label and an API name.
- · Select the 'Recommendations' object.
- Use conditions in the 'Filter' section to specify the particular recommendation you wish to use.
- Incorporate additional flow elements as necessary to complete your strategy.
- To make the recommendation available in an Einstein Next Best Action component, add an 'Assignment' element.
- · For the 'Variable', choose 'outputRecommendations'.
- Set the 'Operator' to 'Equals' and the 'Value' to your predefined recommendation.
- Save the flow.



• Finally, activate your flow.

Select Continue in Strategy Builder

tion	New Strategy
low Duilder, the future of low-code automation, you can do most things in Strategy Builder—and morel Sales building automation in Flow Builder.	force plans to retire Strategy Builder and recommends <u>Try.Elson Builder</u>
Try Flow Builder	
Flow Builder is the future of low-code automation. You can use it to create most of the automation you build in Strategy Builder. Start using Recommendation Strategy flows today!	creating recommendation records. Then design a strategy that evaluates
Continue in Strategy Builder Create in Flow Builder	commendations.
	building accountions in the buildon Try Flow Builder Flow Builder Allow of the cable actionation you build in Strategy Buildin: Start caing Recommendation Strategy from today

For VoiceCall: Select the VoiceCall Object.

	New Strategy
* Name	* API Name
Voice Strategy	Voice
Description	
Object Where Recommendations Displ	lay O
Voice Call	
Template 🕕	

For Messaging: Select the Experience Object.

*Name	* API Name
Messaging_Strategy	Messaging_Strategy
escription	
escription	
Description	
Description	
Description	
	Direlay
Description Dbject Where Recommendation Experience	Display 🕚

Workflow Example :



Load List Recommendations: Begin by importing or inputting a list of recommendations into the system.

Object: Defines the source from which recommendations will be pulled. Value: "Recommendation"

Field:

Purpose: Select the specific field from the recommendation records that will be evaluated. Input Type: Dropdown Value: "Description" or "Name"

Operator: Purpose: Specifies the relationship between the Field and Value. Input Type: Dropdown Example Value: "Contains"

Value: Purpose: The content against which the Field will be evaluated based on the Operator. Input Type: Text Example Value: "reset password" (preferable lower case)

Add Condition: Button to add more filter conditions.

	Edit Load	
Label	* API Name	
List Recommendations	List_Recommendations	
escription		
		6
elect Recommendation Source		
viet 0		
Recommendation		
ilter Recommendation Records		
ilter Recommendation Records and tion Requirements All Conditions are Met *		
and tion Requirements	Opener Wia	
and tion Requirements All Conditions are Met 🔹 👻	Commin Wile Commin V Here passood	â
All Conditions are Met Fiel Description		Ť
and tion Requirements All Conditions are Met		â
All Conditions are Met Fiel Description		Î
All Conditions are Met All Conditions are Met		â
Al Conformants Al Conformants free free free free free free free fr	Contains • Real passoon	â
All Conditioner an Net All Conditioner an Net	Contrain V rest parmood	â

Branch Selector (Filter by utterance): Evaluate user input (e.g., Last utterance) and determine the appropriate branch or recommendation logic to follow.

Resource:

Purpose: Identifies the specific data point or resource that will be evaluated. Input Type: Dropdown Example Value: "\$Record.genesysps_Last_utterance"

Operator: Purpose: Specifies the relationship between the Resource and Value. Input Type: Dropdown Example Value: "Contains"

Value: Purpose: The content against which the Resource will be evaluated based on the Operator. Input Type: Text Example Value: "password"

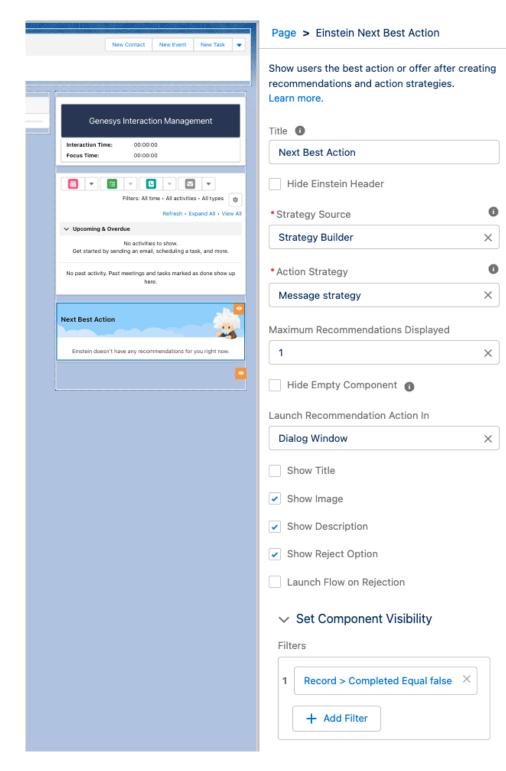
Add Condition: Button to incorporate additional filter conditions.

Add conditions to branches. When the cond	ition is true, the recommendatio	is in the branch move forward	1.	
*Label		* API Name		
Filter by utterence		Filter_by_utterence		
Description				
Settings				
Evaluate each branch in order, starting at th	a top of the capute and moving	lown Prancher that meet the	conditions are allowed	
cranate each pranch in order, starting at th	e top of the canvas and moving		conditions are anowed.	
Only allow recommendations from the first	branch that meets the conditions			
Only allow recommendations from the first				
Branch 1: List Recommendati	ons			
	ons			
Branch 1: List Recommendati	ons			
Branch 1: List Recommendati Recommendations from branch 1 are Standard Advanced	ons			
Branch 1: List Recommendati Recommendations from branch 1 are Standard Advanced When to Execute Filter	ons allowed when this condition i			
Branch 1: List Recommendati Recommendations from branch 1 are Standard Advanced	ons			
Branch 1: List Recommendati Recommendations from branch 1 are Standard Advanced When to Execute Filter All Conditions Are Met	ons allowed when this condition i	true.		
Branch 1: List Recommendati Recommendations from branch 1 are Standard Advanced When to Execute Filter All Conditions Are Met Besource	ns allowed when this condition i	true.		
Branch 1: List Recommendati Recommendations from branch 1 are Standard Advanced When to Execute Filter All Conditions Are Met	ns allowed when this condition i	true.	1	
Branch 1: List Recommendati Recommendations from branch 1 are Standard Advanced When to Execute Filter All Conditions Are Met Besource	ns allowed when this condition i	true.	5	
Branch 1: List Recommendation Recommendations from branch 1 are Standard Advanced When to Execute Filter All Conditions Are Met Resource Stecordgenesysps_Last	ns allowed when this condition i	true.	ĩ	
Branch 1: List Recommendation Recommendations from branch 1 are Standard Advanced When to Execute Filter All Conditions Are Met Resource Stecordgenesysps_Last	ns allowed when this condition i	true.	g	

Save the Strategy

In the VoiceCall or Experience page, add an Einstein Next Best Action component and set its Action Strategy to the Recommendation Strategy you just created:

POST INSTALL STEPS



Genesys Cloud for Real Time Voice Transcription

To add a Real Time Voice Transcription Component to a voice call record page in Salesforce, you would typically use Lightning App Builder. Here are the steps to do so:

- · Go to Setup in Salesforce.
- In the Quick Find box, enter "Lightning App Builder."
- · Click "Lightning App Builder" under User Interface.
- In the Lightning App Builder, select the VoiceCall record page
- · In the App Builder, add the following components:
 - Enhanced Conversation (Standard Salesforce Component)
 - Genesys Cloud CX Voice Transcript
 - Genesys Cloud Einstein Assist (Ignore if it's added in omni-channel utility)

고))~것 \=		501-2)			
Voice Call +91 44 69	25 8000	lew Contact New Oppor	tunity New Case 👻	Next Best Action	
elated Record	Call Started 10/28/2023, 3:20 AM	Call Duration 00:02:18	Call Type Inbound	Einstein doesn't have any reco you right nov	
No recording	is available. play call recordings and see o	all state here		Conversation	
four de able to	play can recordings and see o	an stats nere.		Conversation Starte	4 - 459 044
Details F	eed Related				
			/	Conversations will	
v Detaik			Enhance	ed Conversation	
			Linance	a conversation	show up here.
Caller Number		Call 7/pe			Agent + 5:23 PM
+91 44 6925 8000		Inbound			
Owner Name		Call Status			
🖰 User User		completed			
Call Started		Recipient Number			
10/28/2023, 3:20 A	м	Praveen Kasturi			
Call Entered Queue		Previous Call			
Call Accepted		Next Call			
	м				
10/28/2023, 3:20 A		Cell Duration		-	+
10/28/2023, 3:20 A Call Ended					

Verify that voice transcription is enabled at both the organization level and the queue level in Configure voice transcription

The real-time voice transcription functions through the Voice Call object, sending the transcript to Salesforce for display on the user interface. It is essential to configure the correct private key for this operation; note that this is not the Einstein private key, but rather the one specifically for setting up the Service Cloud Voice integration. Additionally, ensure you select the appropriate contact center. For access to the remote site settings, proceed with the following steps.

Navigate to Setup -> Quick Find -> Security -> Remote Site Settings -> New Remote Site

Q, remote	SET D				
✓ Custom Code	K	emote Site Setting	js		
Security <u>Remote Site Settings</u>	Below is the I	note Sites ist of Web addresses that your Remote Sites		esforce.com. To add another Web address, click New Remote Site.	
				New Remot	4- 014-
	Action	Remote Site Name +	Namespace Prefix	Remote Site URL	te Site Activ
	Action Edit Del	Remote Site Name + ApexDevNet	Namespace Prefix genesysps	Remote Site URL http://www.apexdevnet.com	
Didn't find what you're looking for? Try using Global Search.					te Site

To modify your Salesforce domain URL and replace "lightning.force.com" with ".my.salesforce-scrt.com", follow these steps:

Identify Your Current Domain URL: Make sure you know your current Salesforce domain URL. It will look something like this: https://saas-data-524-dev-ed.scratch.lightning.force.com.

Extract Domain Prefix: From the URL, extract the domain prefix. For the example URL provided, the domain prefix is saas-data-524-dev-ed.scratch.

Modify The Domain URL: Replace "lightning.force.com" with ".my.salesforce-scrt.com". Using the extracted domain prefix, your new URL will look like this: https://saas-data-524-dev-ed.scratch.my.salesforce-scrt.com.

Remote Site Settings									
Remote Site Edit Enter the URL for the remote site. All s-controls, JavaScrip	t OnClick commands in custom buttons, Apex, and AJAX proxy calls can access this Web address from salesforce.com.								
Remote Site Edit	Save & New Cancel								
Remote Site Name Remote Site URL Disable Protocol Security Description Active	VoiceTranscript https://saas-data-524-dev-ed.scratch.my.salesforce-scrt.com								
Save Save & New Cancel									

Tips for your Genesys Cloud Architect Flow

It is possible to make CX Cloud, Digital and AI for Salesforce Service Cloud stitch Salesforce Contact and Case automatically.

To do so, you need to add the following attributes to the customer participant data to the Genesys Cloud Architect Flow:

- firstName
- lastName
- email
- caseNumber

When the Experience gets created, CX Cloud, Digital and AI for Salesforce Service Cloud will search for a Salesforce Contact with the same email. If not found, it will create a new Contact. If found, it will also try to connect to the given Case Number (if provided).

In Architect, you can use the Set Participant Data step to set the attributes:

14 Set Participant Data					
1: firstName = State.FirstName					
2: lastName = State.LastName					
3: email = State.Email					

Multi-Org Setup

Single Salesforce Org with multiple Genesys Cloud Orgs

In cases where a single Salesforce Org needs to be integrated with multiple Genesys Cloud Orgs, it can be accomplished by creating separate Lightning Applications for each respective Org in Genesys Cloud. This can be done regardless of whether Salesforce Cloud Voice is used. This section details the steps / configurations to

integrate a single Salesforce Org with more than one Genesys Cloud Org. This section assumes readers have already completed the setup for a single Genesys Cloud Org, and as such omits details previously covered, yet required to complete the setup. Suffice to say, completing the setup for a single Genesys Cloud org is a prerequisite, specifically the Package Install and Post Install steps covered previously in this document.

Create a new Lightning App for the Respective Genesys Cloud Org

In the Salesforce setup, under the "Apps" section open "App Manager" and click on the New Lighting App button

	•																	
L	Setup Home Object Manager V																	
Ľ	App	15				SETUP	SULLIZ N	1788-11847 - 1788-114		265341317	NUMAN //////////////		11 - <i>777 -</i> SAUG H <i>ENNING HING</i>		New Lightning App	New Connected A		1
		App Manager		_	Lightning Experience App Manager													
г		AppExchange I																
					A 3 14					$1/2 \sim 1/2$		-					- A.	
	>	Connected App	ps													-	_	
	>	External Client	Apps		24 items - Sorted by App Name - Fitzered by All appmenuitems - TabSet Type													
	>	Lightning Bolt				App Name †	~	Developer Name	\sim	Description	~		Last Modified Date 🗸	Ap	рр Туре	`	 Vis 	
		Makila Appa											AIF 18 4 5 4 5 4 5 4 5 1 1 1	-01				

App Details and Branding For the first step, App Details and Branding, choose an appropriate name considering the fact it may be helpful to easily identity the respective Genesys Cloud Org the Lightning App will represent. After you've chosen a name and filled in the other options, click Next to proceed to the App Options menu.

New Lightning App							
Give your Lightning spo a name and description. Upland	Is & Branding an image and choose the highlight color for its navigation bar.						
App Details *App Starse @ Extract Center - Hig Second GC Org *Denoiseer Name @ Extract_Center_Jay, Second, GC, Org Generation @ finter a description	App Brancing Transf Primery Color Hex Value Primery Color Hex Value Primery Color Hex Value Primery Primery Contract Center - My Seco Contract Center -						
0	- 1 i lier						

App Options Under the Navigation Style select "Console navigation" (default options my be accepted for the rest) and click Next.

App Options



Navigation Style Standard navigation Console navigation Supported Form Factors Desktop and phone Desktop Phone

Setup and Personalization ()

Setup Experience

- Setup (full set of Setup options)
- Service Setup

App Personalization Settings

Disable end user personalization of nav items in this app

Clear workspace tabs for each new console session

Utility Items On the Utility Items page, add the following:

- 1. Omni-Channel
- 2. Genesys Cloud CX Utility
- 3. CX Cloud, Digital and AI

For each, be sure the Start automatically check box is selected, like so:

Ø Omni-Channel	PROPERTIES	1 Annove		
Genesys Cloud CX Utility	Genesys Cloud CX Utility			
CX Cloud, Digital and Al	✓ Utility Item Properties			
	*Label	0		
	Genesys Cloud CX Utility			
	loon	0		
	+ falback ×			
	Panel Width	0		
	340			
	Panel Height	0		
	480			
	Start automatically	0		

After adding CX Cloud, Digital and AI be sure to fill in the required fields. Note, when selecting whether Salesforce Cloud Voice is installed, it should be considered in the context of the Lightning App being created and the Genesys Cloud Org it reflects, meaning it could be answered negatively even if Salesforce Cloud Voice is being used in elsewhere is the Salesforce Org but not in conjunction with "this" App. Additionally, if you haven't already created the OAuth integration in Genesys Cloud to create the Implicit Grant Client ID, this can be done following the steps previously outlined here

With the Utility Items added, click Next to move to the Navigation Items menu.

Navigation Items On the Navigation Items page add Experiences to the list of selected items. Note, if the application also seves voice, the appropriate item should be added. In the screen shot, this is reflected by the Voice Calls item.

New Lightning App									
Navigation Items Choose the items to include in the app, and arrange the order in which they appear. Uners can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are drapped from the navigation bar when the app is viewed in a format that the item doesn't augport.									
	Available Items	(P) Chato +	Selecte	ed Items					
	Q. Type to filter list	0	_	Experiences					
	Accounts		5	Voice Calls					
1	Alert Settings								
	Al Stes								
	Alternative Payment Met	hods							
	Analytics		-						
	App Launcher	L	4		-				
	R Appointment Categories								
	Appointment invitations								
	Approval Requests								
	Asset Action Sources								
Back 0				o					

Click Next to bring up the Navigation Rules menu.

Navigation Rules Accept the default to have Experiences open as workspace tabs and Click Next to move to the Prodfiles menu.

Navigation Rules

Navigation rules determine whether to open a related record in addition to the primary record.

E Experiences Voice Calls	Experiences open as Workspace tabs Subtabs of	
	Account (Account)	\$

Profiles The final step to complete before the application is ready is selecting the appropriate Profiles. This will vary by deployment. Once the Profiles have been added, click Save and Finish.

New Lightning App									
User Profiles Choose the user profiles that can accrete this app.									
Azailabie Profiles		Selected Profiles	Add the profiles appropriate to you deployment, then click Save and Finish						
Or pype to their list	0	~							
Analytics Cloud Integra	tion User								
Analytics Cloud Securit	y User								
Authenticated Website									
Authenticated Website									
829 Reordering Portal I		No Profiles selected							
Contract Manager	4								
Custom: Marketing Prof	Ye .								
Custom: Sales Prefile									
Custom: Support Profile									
Castomer Community L	eain User								
Beck 00			6 O Geve & Finish						

This completes the setup for the new Lightning App. Provided the previous steps for installing the Package and Post Install setup were complete, you will now be able to use the newly created Lightning Application for the Agents affiliated the corresponding Genesys Cloud Org.

Summary

This approach works by relying on the combination of the Omni Channel widget and other Utility Items configured within the Lightning Application. When Salesforce Cloud Voice is used, because an agent can only belong to a single contact center in Salesforce, when their assigned contact center represents a CX Cloud integration, when an agent opens the Lightnign Application, they're automatically associated with the corresponding Genesys Cloud Org. In this manor, we can create Lightning Applications for any number of Genesys Cloud Orgs. In the cases where agents do not belong to a contact center, i.e. Salesforce Cloud Voice is not used, we determine the Genesys Cloud Org based on the CX Cloud, Digital and AI Utility Item configuration. Similarly, we can continue to add new Lightning Application as needed when SCV is not used to accommodate integration to additional Genesys Cloud Orgs.